

Digital Business Administration

Skills People Group
QUALIFICATIONS & TRAINING

Icebreaker Activity

2 lies, 1 truth

Write down 2 lies and 1 truth about yourself to share with the group.
Can the group guess which is your truth?



Code of Conduct



Safety & Fire Exits



Mobile Phones



**Kitchen &
Refreshments**



Smoking



Attendance



Accidents & First Aid



Accessibility



Drugs & Alcohol

QUESTIONS



Wider Learning

Safeguarding



Prevent -
Radicalisation
and Extremism



Fundamental
British Values



Online Safety



Equality &
Diversity



Safeguarding

Safeguarding means; protecting children, young people and vulnerable adults from abuse and maltreatment, preventing harm to their health or development and ensuring they have the provision of safe and effective care.

Can you identify 6 types of abuse?



Safeguarding

Types of abuse

Safeguarding is about protecting people from:

Physical
Abuse

Emotional
Abuse

Financial
Abuse

Sexual Abuse

Neglect

Discrimination

Safeguarding



Safeguarding

Safeguarding is everyone's responsibility

If you have an issue or concern, we encourage you to speak to a member of our Safeguarding Team



QUESTIONS



Prevent

The 'Prevent Duty' is a government agenda about preventing people from becoming radicalised, developing extremist views and committing or supporting acts of terrorism.

People don't become radicalised overnight.

There is a process of change.

Prevent aims to spot this change in people and support them.



Prevent – An introduction



British Values

We're committed to the promotion of **Fundamental British values** in all our learning programmes.

Democracy



The Rule of Law



**Individual
Liberty**



**Mutual Respect
& Tolerance**



QUESTIONS



Online Safety

Online safety is the act of protecting yourself and others from online harms and risks which may jeopardise their personal information, lead to unsafe communications or even effect their mental health and wellbeing.

Whilst the internet is a fantastic place to learn it may occasionally bring some challenging issues. These include:

Cyberbullying Pornography Encouragement to self harm

Extremism/radicalisation Theft/fraud Phishing



Online Safety

Tips for staying safe online

Keep personal
information
limited

Keep your
privacy settings
on

Practice safe
browsing

Use a secure
internet
connection

Be careful what
you download

Choose secure
and strong
passwords

Make online
purchases from
secure sites

Be careful what
you post

Be careful who
you meet online

Use anti-virus
software

QUESTIONS



Equality & Diversity

We are committed to **Equality & Diversity** and that means treating everyone with dignity and respect.

Equality

Equality is about ensuring everybody has an equal opportunity, and is not treated differently or discriminated against because of their characteristics.

Diversity

Diversity is about taking account of the differences between people and groups of people, and placing a positive value on those differences.

Equality & Diversity

The **Equality Act 2010** was introduced to offer protection against discrimination to those people with one or more 'protected characteristics'. The protected characteristics are:

Age

Disability

Race

Gender
Reassignment

Sexual
Orientation

Religion or
Belief

Sex

Pregnancy &
Maternity

QUESTIONS



Take a break





Your programme

Digital Business Administration - Overview

Over the next 2 weeks you will develop an understanding of the business and customer service sector as well as gaining the valuable digital skills you require to show potential employers that you are committed and ready to work.



Your programme

Digital Business Administration - Qualifications

1. Pearson BTEC Level 2 Certificate in Principles of Business Administration.
2. Highfield Level 2 Certificate in Customer Service.
3. NCFE Entry Level 3 Essential Digital Skills.

Your programme

Digital Business Administration - Aims

Develop personal skills and knowledge ready for Employment in Business Administration



Develop practical teamwork skills essential to working in Customer Service



Build working relationships with colleagues



Understand the important of customer service principles



Develop knowledge and skills in Digital IT



Understand and gain a qualification in Essential Digital Skills for the workplace



Develop wider learning through self-development



Complete search and application for employment opportunities



Your programme

Assessment - Overview

Written and verbal questions (WQ's)



Classroom group activities



Regular developmental feedback and progress reviews



Practical Observation



Attendance



OneFile e-learning platform



Your programme

Digital Business Administration– Schedule

Monday – Friday 9am – 3:30pm

Week 1

Being Safe Online
Business Principles
Providing Effective Services
Preparing Documents
Creating Digital Documents
Personal development
Career Progressions

Week 2

Dealing with customers
Communicating with customers
Digital Communications
Digital Transactions
Customer Service Practical
EDSQ Assessments
Job application (if applicable)



Your Portfolio

In order to successfully achieve your programme, you will be required to develop a portfolio of evidence. This will be completed using our E-Portfolio system, **OneFile**.

Here you will receive regular feedback and support from your tutor on your progress.





Tasks

1. Learner Code of Conduct
2. Learner Declaration
3. Use of Images Declaration
4. Understand TLAPs



Your Voice

Compliments, appeals & complaints

We are always looking at ways in which we can improve our services and celebrate success!

You can feedback to your Tutor, Academy Manager or you can email **yourvoice@skillspeoplegroup.com**



Any Questions?



**Please use this opportunity to ask
questions**

Digital Business Administration

 **Skills People Group**
QUALIFICATIONS & TRAINING

Tutor Name

Digital Business
Administration

Skins People Group
QUALIFICATIONS & TRAINING

Introduction

Intent

- To learner about the Digital Business Administration workplace
- To develop business skills to promote a career in administration
- To progress further in employment opportunities

Implementation

- PowerPoint training aid, group discussion and practical tasks
- OneFile written criteria (Written Questions)
- Group work to complete observation of skills and competence

Impact

- To use your understanding of Digital Business Administration
- To provide supportive evidence towards your learning journey
- To produce work products to show personal development

Our goal is to complete our objectives together using the knowledge, experience and support of the group

Qualifications



To reiterate from your induction, during this 2-week DBA course, you will cover the following qualifications and will receive a certificate for each on completion.

1. Pearson BTEC Level 2 Certificate in Principles of Business Administration
2. Highfield Level 2 Certificate in Customer Service
3. NCFE Entry Level 3 Essential Digital Skills

The 2-week programme is available to view on the wall with the highlighted requirements for each day.

Using different types of questions

Describe - As much information as possible to explain your answer in detail

Explain – To add information to explain your answer more.

State – Short sentence complete with a list of items.

Identify – A description of how to establish an answer.

List – Bullet points and a small explanation (if needed)

Suggest – Make suggestions using small sentences

Outline – Brief description including multiple answers



Please use the OneFile '*Operative Verbs*' course if you wish to understand more about the verbs used during this course

Enhancing Digital Skills

*Understanding
Essential
Digital Skills*



Also available is the OneFile
‘Understanding Essential Digital Skills’
course to confirm your knowledge before
starting the assessments in week 2.

So, what are we going to do today?

- 1) Looking at the principles of working in Business Admin and how we source information.
- 2) Introduce organisational structures in business.
- 3) Complete written questions 1 (WQ1 Q1 - 6)



Any Questions?



Sources of information

➤ Industry:

- Line management.
- HR department.
- Organisation information systems (O.I.S)

➤ Occupation:

- Website. (authentic)
- Co-workers.
- Job description.



➤ Training:

- Line management & HR department.
- College.
- Training services.

➤ Career:

- Professional bodies.
- Career services (HR).
- Sector skills councils.

Career progression routes

What progression routes can you think of for a Business Administrator?

Receptionist / Admin Assistant

Supervisor / Manager

Customer service / Help-desk

Digital or IT

Finance / Payroll

Operations Coordinator



Transferable skills, what are they?

Skill	Answer
Communication	
Problem solving	
Organisation	

Transferable skills, what are they?

Skill	Answer
Time management	
Personal motivation	
Personal development	

Any Questions?



Different sectors (3 types)

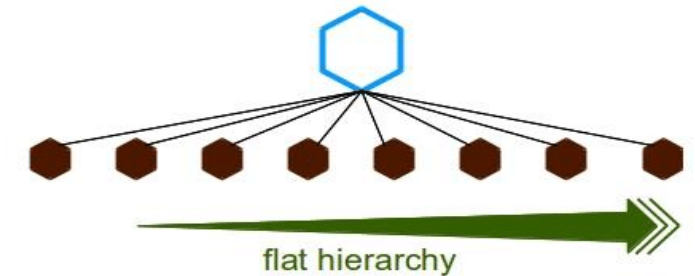
- **Private sector** – The private sector is the part of the economy which is run by private individuals or groups, usually as a means of enterprise for profit, and is not controlled by the government e.g. sole trader, partnership, limited company, public limited company; run by individuals and companies.
- **Public sector** – The public sector is the part of the economy composed of both public services and public enterprises. Public services include public goods and governmental services such as the military, police, infrastructure, public transit, public education, along with health care and those working for the government itself, such as elected officials.
- **Voluntary sector** - The voluntary sector or community sector (also non-profit sector or not-for-profit sector) is the duty of social activity undertaken by organisations that are not for-profit and non-governmental. This sector is also called the third sector, in contrast to the public sector and the private sector. charities, housing associations, neighbourhood watch schemes; not for profit organisations; benefit from the public donations.

Organisational structure

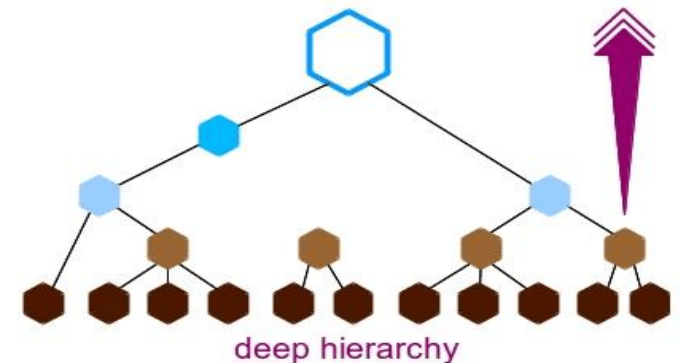
What is it?

An organisational structure consists of activities such as task allocation, coordination and supervision, which are directed towards the achievement of organisational aims. It can also be considered as the viewing glass or perspective through which individuals see their organisation and its environment.

➤ **Flat hierarchical** - A flat hierarchy is where the organisation has a few or no levels of middle management between executives and staff. Flat hierarchical examples are having a wide span of control, short lines of communication.



➤ **Tall (Deep) hierarchical** - Resembling a pyramid, this structure has multi levels and it gets wider as you move down - usually with one chief executive at the top, followed by senior management, middle managers and finally workers.



Functional areas

	Role in business organisations

Any Questions?





TLAP completion and review

Read through your answers to ensure you have completed them to the requirements of the assessment, use all resources sourced for this learning outcome adding any additional information if necessary.

DBA TLAP- Day 1

OneFile

Day 1 - Complete all tasks for TLAP 1

You must include;

- Learning Activities – As instructed by Tutor
- Any additional Learning activities completed before/after the course or at home.
- Please ensure you click save and submit.
- Add time spent of additional activities if required.



Tutor Name

A woman in a business suit is floating in a digital space. The background features a cityscape at night with glowing lights and various network icons (Wi-Fi, location, etc.) connected by lines. The overall theme is technology and digital communication.

Role and Behaviour of an Administrator

Skins People Group
QUALIFICATIONS & TRAINING

Introduction

Intent

- To learner about the role of an administrator
- To develop knowledge of professional behaviour
- To learn about the types and organization of business meetings

Implementation

- PowerPoint training aid, group discussion and practical tasks
- OneFile written criteria (Written Questions)
- Group work to complete observation of skills and competence

Impact

- To use your understanding of Digital Business Administration
- To provide supportive evidence through the completed WQ2
- To support personal development in Business Administration

Our goal is to complete our objectives together using the knowledge, experience and support of the group

Using different types of questions

Describe - As much information as possible to explain your answer in detail

Explain – To add information to explain your answer more.

State – Short sentence complete with a list of items.

Identify – A description of how to establish an answer.

List – Bullet points and a small explanation (if needed)

Suggest – Make suggestions using small sentences

Outline – Brief description including multiple answers



Please use the OneFile '*Operative Verbs*' course if you wish to understand more about the verbs used during this course

So, what are we going to do today?

- 1) Looking at the role of a Business Administrator.
- 2) Understand the requirement for professional behaviour in the workplace.
- 3) Understand how to behave professionally in the workplace.
- 4) Understand the organisation and administration of business meetings.
- 5) Complete written questions (WQ2 Q1 - 13)



Any Questions?



Personal behaviour to meet
Organisational Standards and
values

Why are these organisational
values and standards
important?



Integrity



Courage



Openness



Respect



Excellence

Organisational behaviour

So why is it important to behave in a way that meets these values and standards?

- ***Gives a Positive impression*** – You do not only represent yourself but also the company and business you are employed to promote, giving a positive impression is the base that which the client or customer will see your attitude towards their custom.
- ***Shows respect for others*** – Respect is part of the role to both your customers and colleagues at work and provides an effective working environment where employees feel equal.
- ***Portraits a Professional image*** – This is what you are paid for as again you represent the company and all the hard work in multi departments can be lost if a link in the chain is unprofessional to the organisations operations.

Organisational contribution

How the work of an administrator can contribute to organisational growth.

Work of administrator helps organisational growth by;

- Displaying consistent positive and effective attitudes at work.
- Producing consistently high standards of output of work.
- Working as a team member with other colleagues.
- Using feedback from colleagues and customers to improve own performance.

How the role of an administrator contributes towards the overall commercial activities of business organisations.

The administrator contributes to overall commercial activities through;

- Effective communication with both internal and external customers of the organisation.
- Dealing quickly and efficiently with customer queries or complaints.
- Treating all stakeholders of the business with respect.
- Booking travel and events.
- Involvement in meetings.

Any Questions?



Personal Behaviour

	Description

Personal Behaviour

Why is professional behaviour important in the workplace?

Your actions can be seen as a form of character reference to who you are, how you work and what your personal standard levels. There is a requirement for professional behaviour specified by the industry, by the employer and by the job roles e.g. customer facing; need to conform to specified standards. We can;

- Contribute to organisational goals.
- Meeting role requirements.
- Meeting work targets.
- Working efficiently and effectively.
- Effective working relationships by working co-operatively with colleagues.
- Working co-operatively with others externally e.g. customers, clients, visitors.



Taking Responsibility for your own work

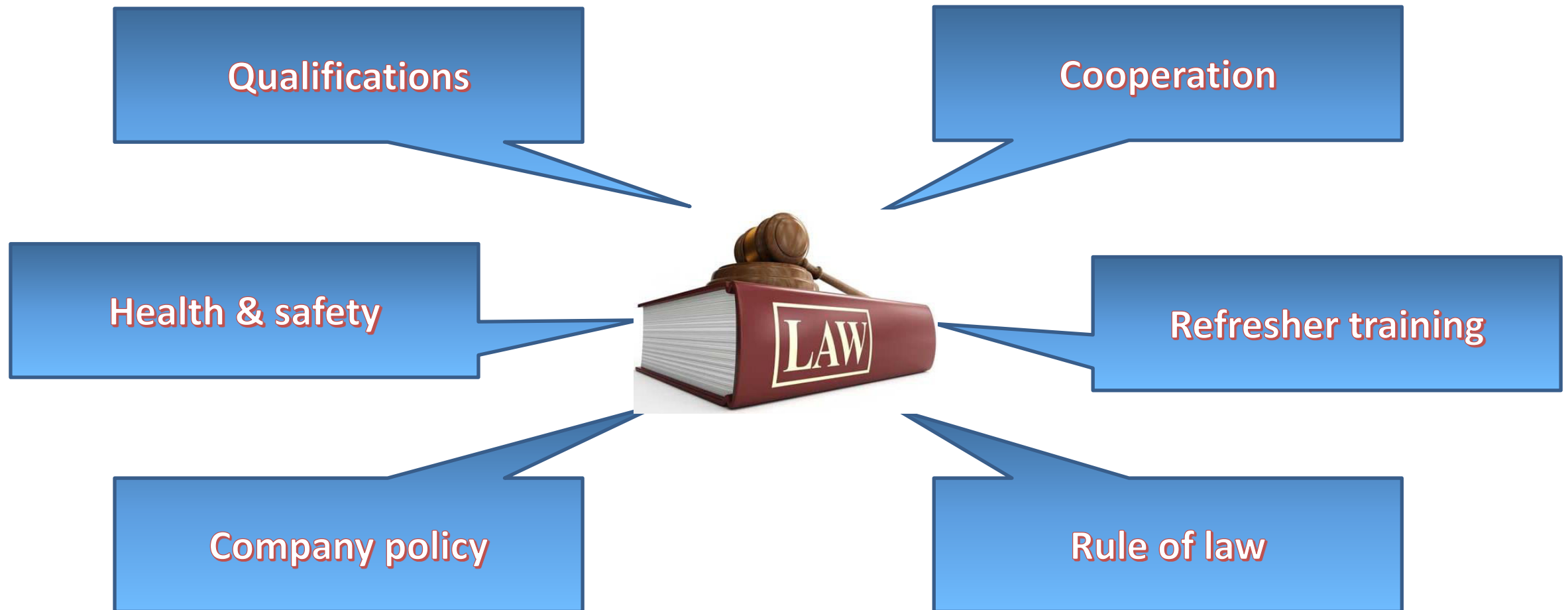
The importance of individuals taking responsibility for their own work is very much on the standard of work they do, several criteria make it important to follow;

- Own responsibility is to fulfil the job role.
- Delegated authority to carry out tasks.
- Being accountable to others for tasks.
- Using own initiative.
- Working independently.
- Avoidance of need to refer to others.
- Improved job satisfaction and motivation.



Legal & Regulator Requirements

As a group, can you identify what legal and regulatory requirements are linked to professional behaviour



Any Questions?



Personal Effective Qualities

- Reliability - team leaders being able to depends on team members.
- Knowledge – common sense approach combined with previous experience.
- Integrity - honesty and trustworthy.
- Good relationship skills - effective team members.
- Selfless - to share and see the teams objectives more important than their own.
- Cooperation - work together.
- Enthusiasm - passionate and driven.
- Commitment - to meet the teams objectives.
- Respectful - value the team.
- Sense of Humour - to see the lighter side in difficult times.



Being Professional

How would you act in a professionally in the workplace?

Acting professionally is so important as part of your influence on the way you view your role and the actions that define it. To be professional is a choice through various methods.

- Meet role requirements.
- Follow organisational requirements.
- Demonstrate organisational commitment.
- Co-operative working and interactions with others.
- Contribute to team work.



Being Professional

How can we develop our behaviour that best meets the needs and requirements of the role and company?

Personal development is very much a personal drive to learn and develop to promote your abilities, skills and qualities using various methods.

- Attend inhouse training.
- Attend external training.
- Professional development opportunities.
- Personal development opportunities.
- Mentoring.
- Work shadowing.
- On the job coaching.



Any Questions?

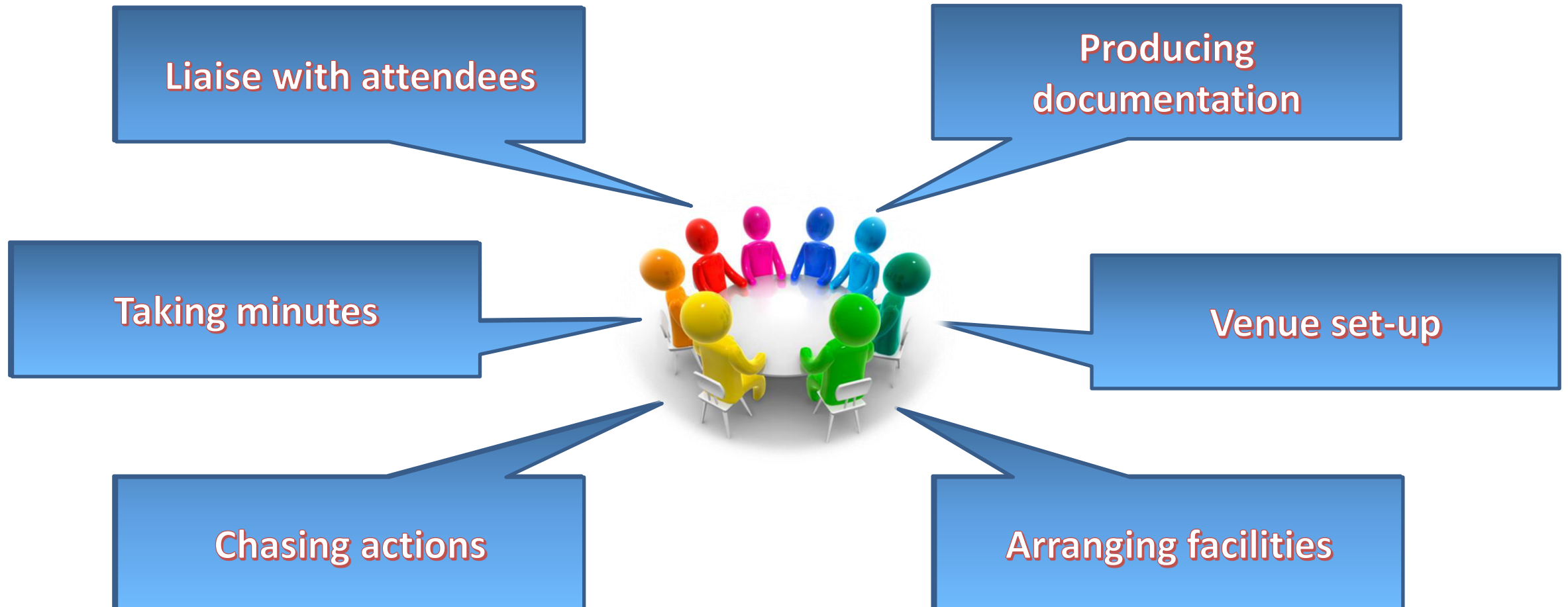


Types of Meetings

	Description

Ways to provide admin support for meetings

As a group, can you identify different ways of providing administrative support for meetings



Activities for organising meetings

	Activities when organising meetings
<u>Before</u>	
<u>During</u>	
<u>After</u>	

Any Questions?





TLAP completion and review

Read through your answers to ensure you have completed them to the requirements of the assessment, use all resources sourced for this learning outcome adding any additional information if necessary.

DBA TLAP- Day 2

OneFile

Complete all tasks for TLAP 2

You must include;

- Learning Activities – As instructed by Tutor
- Any additional Learning activities completed before/after the course or at home.
- Please ensure you click save and submit.
- Add time spent of additional activities if required.



Tutor Name



Providing
Administrative Services

Skills People Group
QUALIFICATIONS & TRAINING

Introduction

Intent

- To learner about managing diaries and travel coordination
- To develop knowledge of using different office equipment
- To learn about the use of mailing services

Implementation

- PowerPoint training aid, group discussion and practical tasks
- OneFile written criteria (Written Questions)
- Group work to support observations of skills and competence

Impact

- To use your understanding of Digital Business Administration
- To provide supportive evidence through the completed WQ3
- To support personal development in Business Administration

Our goal is to complete our objectives together using the knowledge, experience and support of the group

Using different types of questions

Describe - As much information as possible to explain your answer in detail

Explain – To add information to explain your answer more.

State – Short sentence complete with a list of items.

Identify – A description of how to establish an answer.

List – Bullet points and a small explanation (if needed)

Suggest – Make suggestions using small sentences

Outline – Brief description including multiple answers



Please use the OneFile '*Operative Verbs*' course if you wish to understand more about the verbs used during this course

So, what are we going to do today?

- 1) Understand how to manage diary systems.
- 2) Understand how to use office equipment.
- 3) Understand the use of mail services.
- 4) Understand the principles of customer service in a business environment.
- 5) Complete written questions (WQ3 Q1 - 16)



Any Questions?



Travel & accommodation

Different travel types:

Different accommodation types:

Confirming information

Why do we ensure we understand the information when booking travel and accommodation?

Travel: We need to make sure that the personnel booked to travel for business purposes are going to arrive at their destination on time, as planned, as far as reasonable comfortable departure and destination points.

- Departure times,
- Ticket collection.
- Car parking arrangements.
- Onward transfers.
- Mode of transport.
- Need for passport/visa.
- Any cultural considerations.

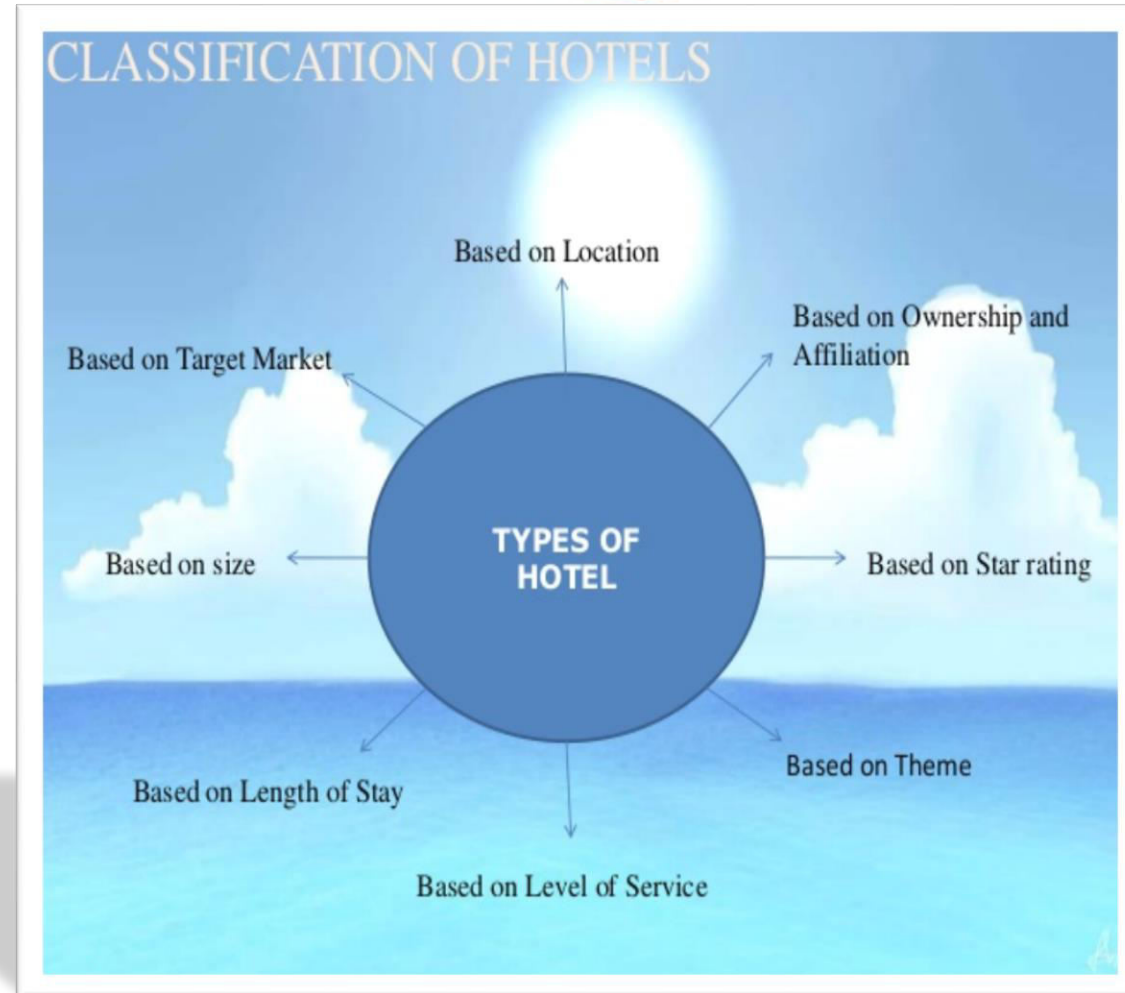


Confirming information

Why do we ensure we understand the information when booking travel and accommodation?

Accommodation: This can be the most important aspect of administrative bookings as it could mean a pleasant or unpleasant trip, we ensure we check.

- Location of accommodation.
- Payment arrangements.
- Accommodation type.
- Amenities.
- Check in and check out times



Confirming information

Why do we ensure we understand the information when booking travel and accommodation?

Importance: Purpose of confirming instructions and requirements is to ensure the booking and business trip by check booking arrangements are accurate; check any amendments to itinerary; ensure punctual arrival; convenience for attendee; correct documentation is taken; minimise costs through cancellations.

Keeping records: It is important to record the destination; dates; costs; agencies/companies used, invoices, travel itineraries and insurance content for the purpose of.

- Taxation.
- Cross reference against records.
- Evaluation of agencies/companies to inform future bookings.
- Company expenditure.



Any Questions?



Diary Systems

What is the purpose of keeping diaries?

Electronic

Electronic diary systems have generally a single copy share with the user and making changes and viewing digital copies are maintained or updated. They are easy to change very portable but can sometimes contain mistakes due to human error.

1. Easy to change
2. Time notification
3. Ability to view multiple calendars at one time.
4. You can send invitations to multiple attendees.
5. They also have a variety of viewing options.

Online Diary Management



	28 Monday	29 Tuesday	30 Wednesday	31 Thursday	1 Friday	2 Saturday	3 Sunday
7 am	Home office	CBD	CBD	CBD	Eastern Suburbs		
8 ⁰⁰					Travel by car	Train	
9 ⁰⁰	Admin	Reading Train	Train	Train		Seminar	
10 ⁰⁰	Planning	Tram	Prep/Setup time	Admin/Email	Prep/Reading time		
11 ⁰⁰	Client Work	Coffee with XX	Session with XX	Travel	Session with YY		
12 pm		Travel		Coffee with XX			
1 ⁰⁰	Lunch	Lunch with XX	Travel	Travel	Travel		
2 ⁰⁰	Phone call with JF	Travel	Lunch with XX	Shared lunch at Hub	Lunch		
3 ⁰⁰	Notes processing	Client Work	Travel	Better Business Club Meeting	Travel		
4 ⁰⁰	DEV TIME - BEP	Session with XX	Session with XX	Notes processing	Presen		
5 ⁰⁰		Travel		Prep	Debri		
6 ⁰⁰		IIM Meeting		Session with YY	Travel		
		Tram					
		Notemaking Train		Notes processing Train			

An effective diary system enables us to easily plan our activities or that of others we manage the diary for, this then helps;

- To prioritise the activity list as well.
- To maintain deadlines.
- Arrange mutually agreed dates
- List special requirements.
- Co-ordinate with others to reduce communication errors: e.g. people, places, days/times.

Different information needs

Types of information needed to manage a diary system.

- **Dates:** So that we can plan the weekly diary to stop confliction.
- **Times:** Specifies the time appreciation for travel and preparation.
- **Venue:** Everybody needs to be in the same place as instructed.
- **People involved:** Can help identify support and allocate responsibilities.
- **Modes of travel:** to ensure sufficient time available before and after event.

Why is this important?

- It is important to obtain the correct information when making diary entries to co-ordinate personnel, deadlines, identify any conflicting demands, pass accurate information etc.

[illegible]



Office equipment

Factors to be considered when selecting office equipment to complete tasks.

- Safety
- Appropriateness for tasks.
- Availability.
- Cost effectiveness e.g. cost of consumables, printing.
- Speed of operation.
- Time effectiveness.
- Volume of work.
- Confidentiality.



Office equipment

How to keep waste to a minimum when using office equipment.

- Check print requirements before producing in bulk.
- Photocopying back-to-back.
- Producing exact number of copies.
- Making scrap pads from recycled paper.
- Checking correct postage when franking post

Any Questions?



Different types of mail services

The types of mail services used in business organisations.

External	Internal
<ul style="list-style-type: none">➤ Special delivery➤ Recorded being signed for by receiving party➤ 1st class➤ 2nd class➤ Courier services➤ International➤ Confidential	<ul style="list-style-type: none">➤ Hand delivered➤ Internal mail envelope➤ Bulk documents➤ Personnel pigeon holes

Can you explain why there is a need for different types of mail services?

What ever type of service we use there is a requirement for different needs such as:

- Cost, speed, security, convenience, destination, weight of letter/package, robustness of material to be delivered, replacement value of documents/package.

Different types of mail services

The factors to be considered when selecting mail services:

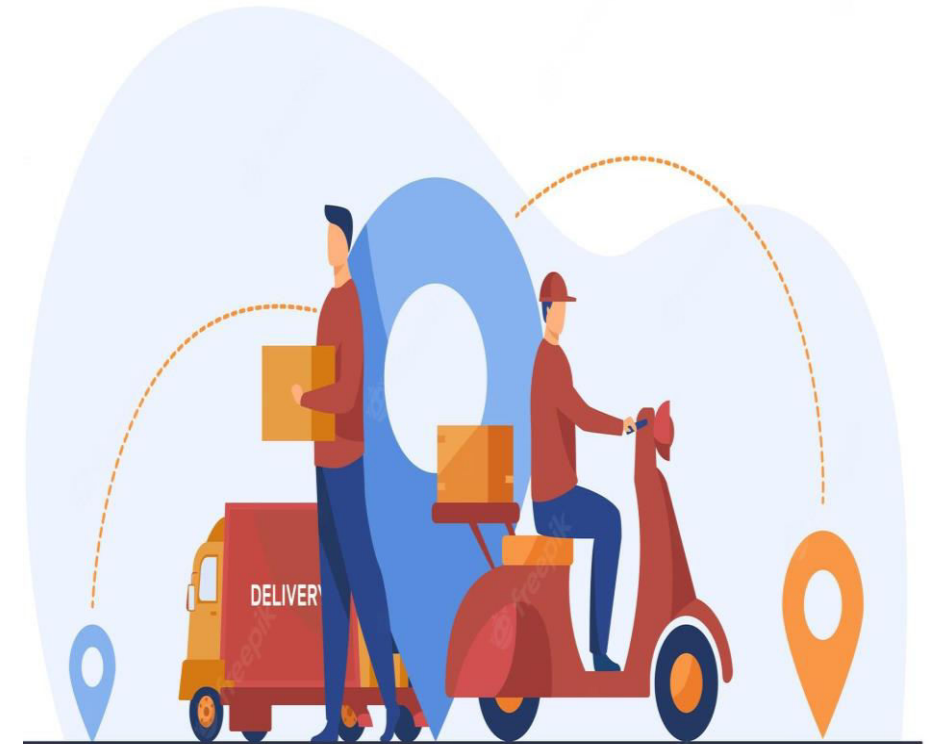
- **Cost:** The cost can be checked to ensure value for money.
- **Speed:** If you need a delivery within 24hrs, next day or the mail is of low importance, the consideration is to ensure customer satisfaction and company operations.
- **Weight:** If the item is heavy then it could be cheaper to use a courier compared to standard delivery methods for which you could pay more.
- **Convenience:** Consideration for convenience is for both for the company operations and the customers based on recipient availability.
- **Packaging:** Is it fit for purpose and how will it affect the overall weight of the item.
- **Importance:** Again if high priority extra can be paid to ensure security and delivery recorded.



Different types of mail services

The factors to be considered when choosing postage methods.

- Postage method to be used.
- Is Special delivery required due to its importance.
- Needs to be signed for.
- Cheaper option to use standard 1st or 2nd class.
- Is it going International and needs to be tracked and signed when delivered.
- Security of the item whether important information or product.
- Speed of delivery information on its receipt.



Any Questions?



Different Customers

There are two types of customer;

Internal: - Internal customers are employees who help to serve external customers located in various departments such as:

- Sales team.
- Colleagues.
- Supervisors.
- Human resources.

External: - External customers are people who can buy and use the products or services being sold, they can fall into a number of categories:

- Loyal Customers
- Discount Customers
- Impulse Customers
- Need-based Customers
- Wandering Customers



Behavioural impact on customers

You do have an impact on your customers depending on your behaviour both negatively and positively.

- A positive impact can make the customer return, they will feel valued as a customer and it gives a positive impression of the organisation
- A negative impact is exactly the opposite customer will go to another company/organisation, customer may become aggressive or rude themselves, customer will feel they are not valued.
- Poor customer service will increase the risk that customer will not return, increase the lack of business opportunities, provide a poor reputation of the organisation, reduce profits, increase customer complaints, affect customer service standards and targets and become stressful to staff.

Any Questions?





TLAP completion and review

Read through your answers to ensure you have completed them to the requirements of the assessment, use all resources sourced for this learning outcome adding any additional information if necessary.

DBA TLAP- Day 3

OneFile

Complete all tasks for TLAP 3

You must include;

- Learning Activities – As instructed by Tutor
- Any additional Learning activities completed before/after the course or at home.
- Please ensure you click save and submit.
- Add time spent of additional activities if required.



Tutor Name

Creating and Storing
Information

Skills People Group
QUALIFICATIONS & TRAINING

Introduction

Intent

- To learn about creating documents and storing information
- To develop knowledge on how to retrieve information
- To apply theory to practical elements of learning

Implementation

- PowerPoint training aid, group discussion and practical tasks
- OneFile written criteria (Written Questions)
- Group work to support observations of skills and competence

Impact

- To develop your understanding of Digital Business Administration
- To provide supportive evidence through the completed WQ4
- To support clerical development in Business Administration

Our goal is to complete our objectives together using the knowledge, experience and support of the group

Using different types of questions

Describe - As much information as possible to explain your answer in detail

Explain – To add information to explain your answer more.

State – Short sentence complete with a list of items.

Identify – A description of how to establish an answer.

List – Bullet points and a small explanation (if needed)

Suggest – Make suggestions using small sentences

Outline – Brief description including multiple answers



Please use the OneFile '**Operative Verbs**' course if you wish to understand more about the verbs used during this course

So, what are we going to do today?

- 1) Understand how to create business documents.
- 2) Understand how to prepare business documentation.
- 3) Understand the principles of information storage
- 4) Understand how to retrieve information.
- 5) Complete written questions (WQ4 Q1 - 15)



Any Questions?





Types of

Documents

What are documents?

A piece of written, printed, or electronic matter that provides information or evidence or that serves as an official record.

Types of documents

[illegible]

Document standards

1. Why do we agree on the usage of documentation?

- i. So that all relevant parties know and understand the reason for the document and how it is to be used.
- ii. It also gives guidance on who can see or edit the document.

2. Why must we agree on the content?

- i. So that we can discuss the same information content in the document to reduce confusion.
- ii. To reduce the risk of displaying sensitive information.

3. Why is it important about an agreed layout?

- i. This makes it easier to find the information applicable to you without having to search or decipher the information.
- ii. To give others the information in a more practical way such as using graphs or diagrams

Document standards

4. Why is it necessary to agree to the quality of the documentation?
 - i. This will be important depending on who the document is intended for.
 - ii. The document will need to be of a high quality as it shows the company standards.

5. Why do we need to understand and agree the deadline when producing documentation?
 - i. So that we can ensure the document is ready and can be checked before publishing.
 - ii. Allows others who are contributing to the document to know when they need to submit the information to collate for the document completion.

Document Control

1. Why do we include document version numbers?

- i. This ensures that the version being used is the up to date version so all users are looking and using the same version of the contents.
- ii. The document will confirm an audit trail of changes, using the version numbers will identify the need to update information.

2. Why is it important that company documentation is authorised and what are the consequences if documents are not controlled?

- i. We need a sense of accountability when using sensitive information, having a different member of staff to authorise the document will ensure compliance.
- ii. Otherwise any changes being made to the document without authorisation can lead users to action on the wrong information which could negatively affect the company operations.



Document Security & Control

1. Security:

We need to ensure the information does not breach security protocols, the storing of business documents needs to be a priority to reduce information theft.

2. Data protection (GDPR):

In accordance with the new GDPR it is law to protect data, the information we acquire or use must be fairly and accurately processed and authorised by a manager. The document must be produced and communicated on a secure system.

3. Copyright:

We need to seek permission to use copyrighted material to minimise the risk of a breach of copyright law costing the company money and image.

4. Intellectual property:

Agreements covering ownership of materials with the authorisation by manager/other departments may need to be sought before use.

Any Questions?



Document Requirements

1. Language

The document must be aimed at the correct audience and to avoid technical terms that the audience may not understand.

2. Tone

Is it to be formal by avoiding the use of slang, full sentences with meaning.

3. Image and presentation

Check spelling, grammar and punctuation are accurate and that any corporate guidelines have been followed, get someone to check the document for you if needed.



Document Requirements



Any Questions?



Systems and procedures

	Description and methods

- Firstly, you must acquire authorisation, a password and understand the guidelines for the use of the information you wish to gain access to.
- The information needed include: the system being used, the location of the system, security measures in place, editing rights etc.

Creating Documents

Team Task



Using a flip chart or tutor handout, research the process for creating both types of documents and their requirements such as text, format, layout etc.

How to create a hard document

How to create an electronic document

Information security

1. Legal requirements:

We have a duty of care to protect information. The General Data Protection Regulations must be adhered to by law as well as our own organisational policies and procedures that must be compliant with current applicable legislation.

2. Organisational policy:

Physical conditions and locations for paper documents are important as well as access to digital documents and backup arrangements for digital documents. Understand which network or remote/cloud archive storage for digital documents..

3. Organisational procedures:

We must follow these procedures for information access, storage, retrieval, sharing and archive to protect ourselves, our customers and our company from breaking the law.

Thinking of the information you have had access to previously and the principles discussed so far, how would ensure the security of information both hard and electronic?

Information security

Why do organisations need procedures for archiving and deleting information?

It is a legal requirement to retain information depending on the organisational and audit requirements for historical purposes which ensures continuity.

Permanent destruction of data and information is done when the information is no longer required and legal requirements demand that we delete the information or limited storage and cost capacity.

Why do we need to retrieve information and why is it so important?

Information retrieval purposes maybe needed when updating records and files, to search for records of transactions and actions on a specific file.

We can also retrieve information for research purposes and collaboration between individuals to better a service.



A magnifying glass with a black handle and frame is positioned over a computer screen. The screen displays a Google search page with a search bar and a list of search methods. The magnifying glass's lens is centered on the list, making the text inside it larger and clearer. The background of the screen shows the Google homepage with the search bar and a list of search methods. The magnifying glass's handle is visible in the bottom left corner, and its frame is visible around the lens. The text inside the lens is in a dark blue font. The background of the screen is a light gray color.

Searching for information

Paper-based information:

- Index cards.
- Strip index cards.
- Visible edge cards.
- Searching alphabetically.
- Searching numerically.
- Searching chronologically.

A magnifying glass with a black handle and frame is positioned over a computer screen. The screen displays a Google search page with a search bar and a list of search results. The magnifying glass is focused on a list of search-related terms. The background shows the Google search page with a search bar and a list of search results. The magnifying glass is positioned over the search results, highlighting the list of search-related terms.

Searching for information

Electronic-based information:

- Directory trees.
- Find/search functions.
 - Keywords.
 - Index fields.
- Specific defining search criteria.
 - Filters.
- Search Engines.



What would you do when problems arise when storing and retrieving information?

Any Questions?





TLAP completion and review

Read through your answers to ensure you have completed them to the requirements of the assessment, use all resources sourced for this learning outcome adding any additional information if necessary.

DBA TLAP- Day 4

OneFile

Complete all tasks for TLAP 4

You must include;

- Learning Activities – As instructed by Tutor
- Any additional Learning activities completed before/after the course or at home.
- Please ensure you click save and submit.
- Add time spent of additional activities if required.



Tutor Name

Principles and Needs of Customer Service

Skills People Group
QUALIFICATIONS & TRAINING

Introduction

Intent

- To learn about the principles of Customer Service
- To develop knowledge on the needs of customers
- To prepare theory to occupational situations

Implementation

- PowerPoint training aid, group discussion and practical tasks
- OneFile written criteria (Written Questions)
- Group work and class discussions

Impact

- To strengthen confidence when dealing with customers in business
- To provide supportive evidence through the completed work
- To support career opportunities in Customer-related business

Our goal is to complete our objectives together using the knowledge, experience and support of the group

Using different types of questions

Describe - As much information as possible to explain your answer in detail

Explain – To add information to explain your answer more.

State – Short sentence complete with a list of items.

Identify – A description of how to establish an answer.

List – Bullet points and a small explanation (if needed)

Suggest – Make suggestions using small sentences

Outline – Brief description including multiple answers



Please use the OneFile '**Operative Verbs**' course if you wish to understand more about the verbs used during this course

So, what are we going to do today?

- 1) Understand the principles of customer service.
- 2) Understand how customer needs and expectations are formed.
- 3) Complete written questions (WQ6 Q1 - 17)



Any Questions?



What is Customer Service?

What does customer service mean to you?





Click to open expanded view

Motorola Moto 360 Smartwatch- Light Chrome/Stone Leather Strap

by Motorola

★★★★★ ▾ 26 customer reviews | 12 answered questions

Price: £239.00 & FREE Delivery in the UK. [Details](#)

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Want it tomorrow, 28 Nov.? Order it within **1 hr 13 mins** and choose One-Day Delivery at checkout.

[Details](#)

5 new from £239.00 1 used from £199.00

Colour Name: **Light Chrome/Grey Leather Strap**



- RRP £199.99
- Voice commands: Just speak to get the info you need.
- All-day battery: Go all day and recharge wirelessly on a dock at night.
- Create your own look: Choose from different designs and strap options.
- Built-in pedometer and heart rate monitor: Track activity right on your wrist.
- Water resistant: Withstands immersion up to 3 feet.

ATTENTION! This single use barbecue will become very hot, do not move it during operation.
Do not use indoors.
CAUTION! Do not use spirit, petrol or comparable fluids for lighting or re-lighting!
WARNING! Keep children and pets away.
DO NOT REFILL! THIS BARBECUE IS FOR SINGLE USE ONLY.
DO NOT DISPOSE OF UNTIL COMPLETELY EXTINGUISHED AND COLD.
(USING EITHER WATER OR INCOMBUSTIBLE PACKAGING IF PROVIDED)

INSTANT BBQ
FAMILY

276012

041303300

2 FOR £7

£2.99

INSTANT GRILL

INSTANT BBQ
STANDARD

253930

041307500

3 FOR £5

£1.00

for outdoor cooking
and disposable
wood and firelighter

WARNING: FOR OUTDOOR USE ONLY

This single use barbecue will become very hot, do not move it during operation.
Do not use indoors.
Do not use spirit, petrol or comparable fluids for lighting or re-lighting.
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Excludes to
B&M Retail Ltd, 124 001

ATTENTION! This single use barbecue will become very hot, do not move it during operation.
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Excludes to
B&M Retail Ltd, 124 001

INSTANT BBQ
STANDARD

3 FOR £5

Introduction

Customer service is about the connections between the providers of goods and services and the people who receive those goods.

In reality it is not just the way customers are treated but also everything you do that contributes to the customers experience.

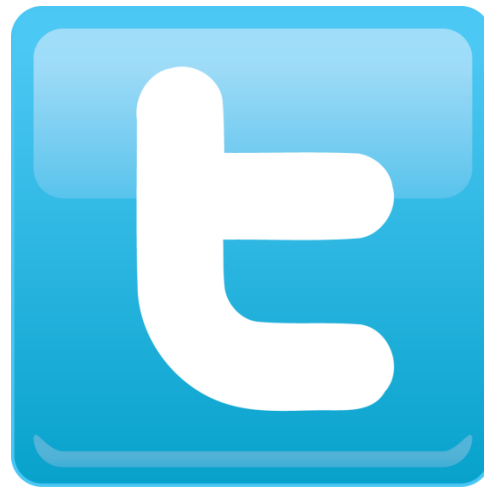
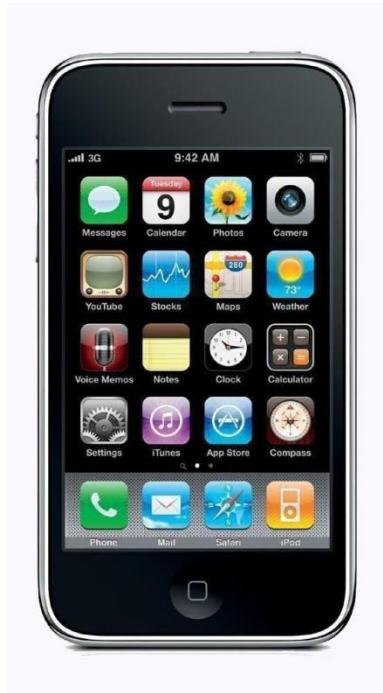
To understand customer service is to use your knowledge as a customer yourself and review your experience.

A positive experience should influence your methods to provide a friendly and enjoyable service.



Social Media and Mobile Networks

How does social media affect customer service expectations and needs?



Effects on an Organisation

Positive:

- Builds Reputation
- Increases Sales and Profits
- Loyal Customers
- Better Image
- Builds Success

Negative:

- Bad Reputation
- Reduces Sales and Profits
- Lose Customers
- Bad Image
- Possible Closure



Types of Online Customers



Discount Seekers

1

Deal Hunters

2

Surfers

3

Wandering Customers

4

Loyal Customers

5

Customers Needs & expectations

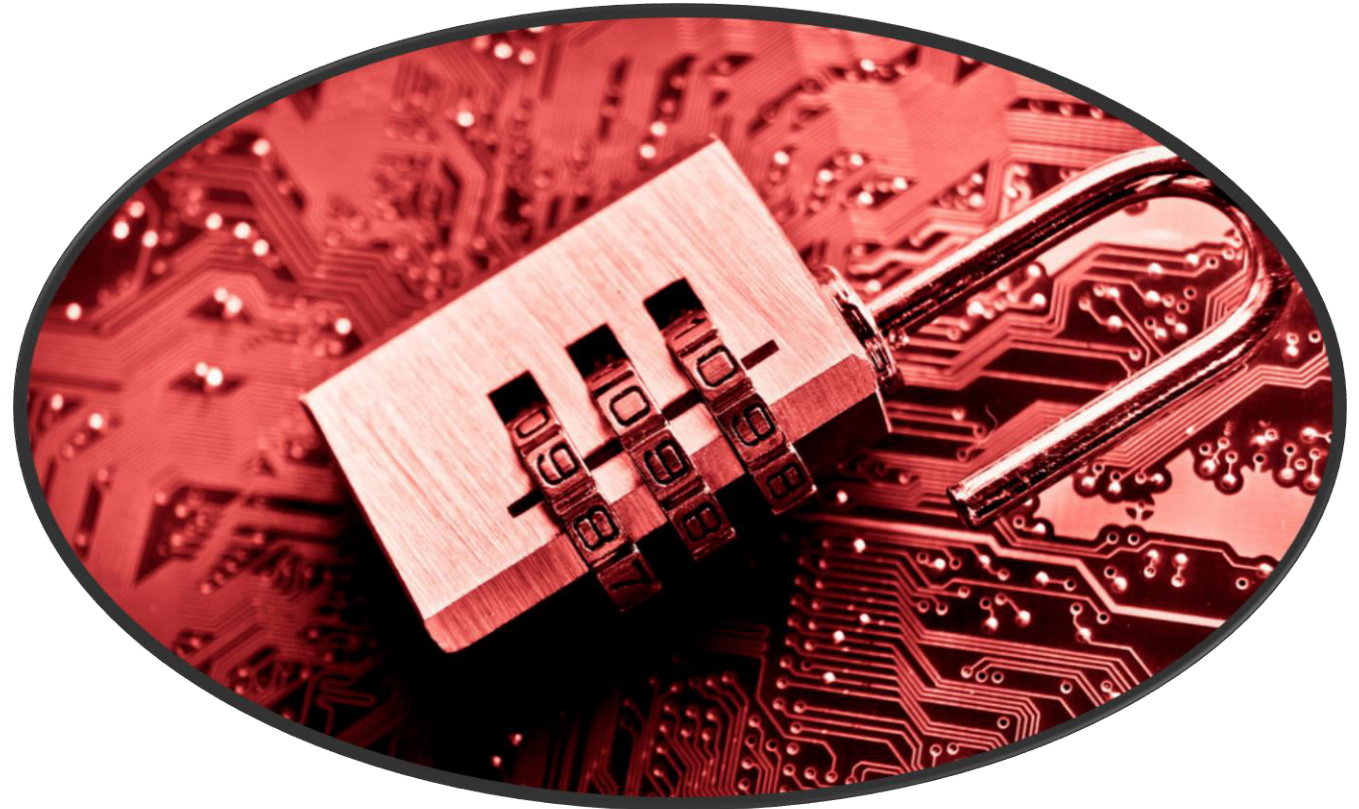
- Price
- Convenience
- Quality
- Reliability
- Time Scales
- Promises Kept
- Value for Money
- Standards of Service
- Presentation (Product & Staff)
- Positive Attitude from Staff
- Products FFP (Fit For Purpose)

➤ Can you think of anymore?



Customer Information that can be retained

- Name & Address
- Contact Details
- Account Details
- Credit History
- Purchase History
- Complaints History



Products, Services & After Sales

Product –

A tangible thing; something like a coat, car or television. The customer buys the product and therefore owns the product.

Service –

A service is something that is provided to a customer but they cannot own it:

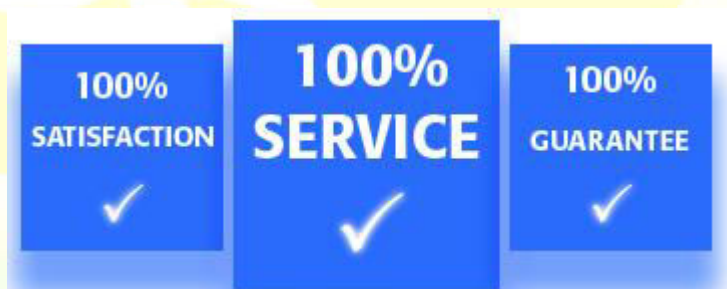
Servicing, Repair policy, Warranty etc

After Sale –

An after sale is a way of promoting a product or service to appeal better to customers and to protect the customer after a purchase.

Product after sales can often involve the following;

Refunds, Exchanges, Warranties, Repair, Services, Guarantees etc



USP & USO

USP (Unique Selling Point or Proposition)

Can make a product appear better or different from that offered by the competitors;

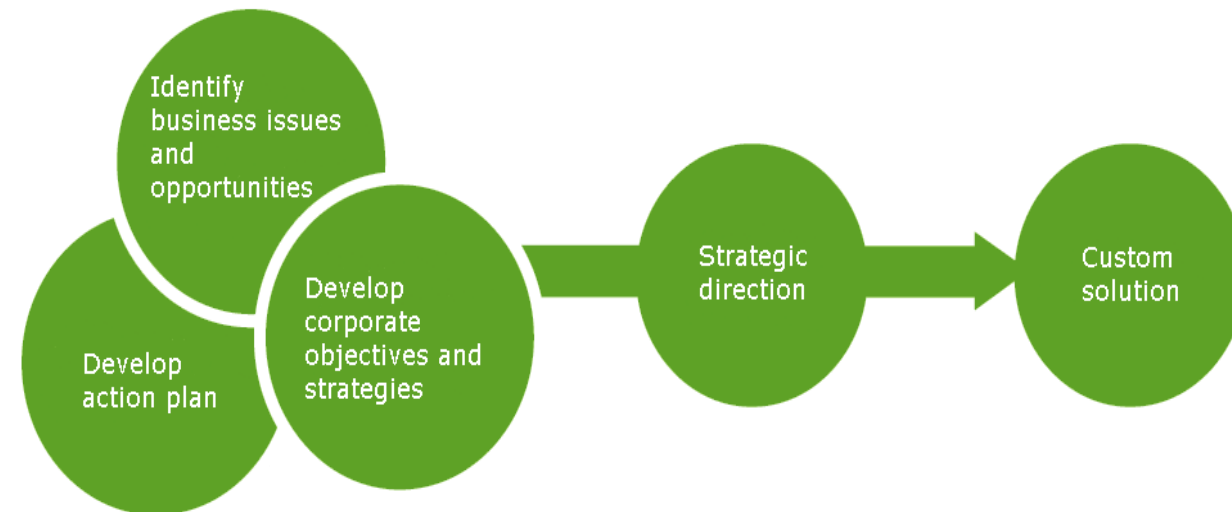
Prices, features, functionality, quality, availability, performance, reliability etc



USO (Unique Service Offer)

Similar to a USP as it makes a service appear better or different from that offered by the competitors such as 24 Hr helpline, guarantee, response time etc

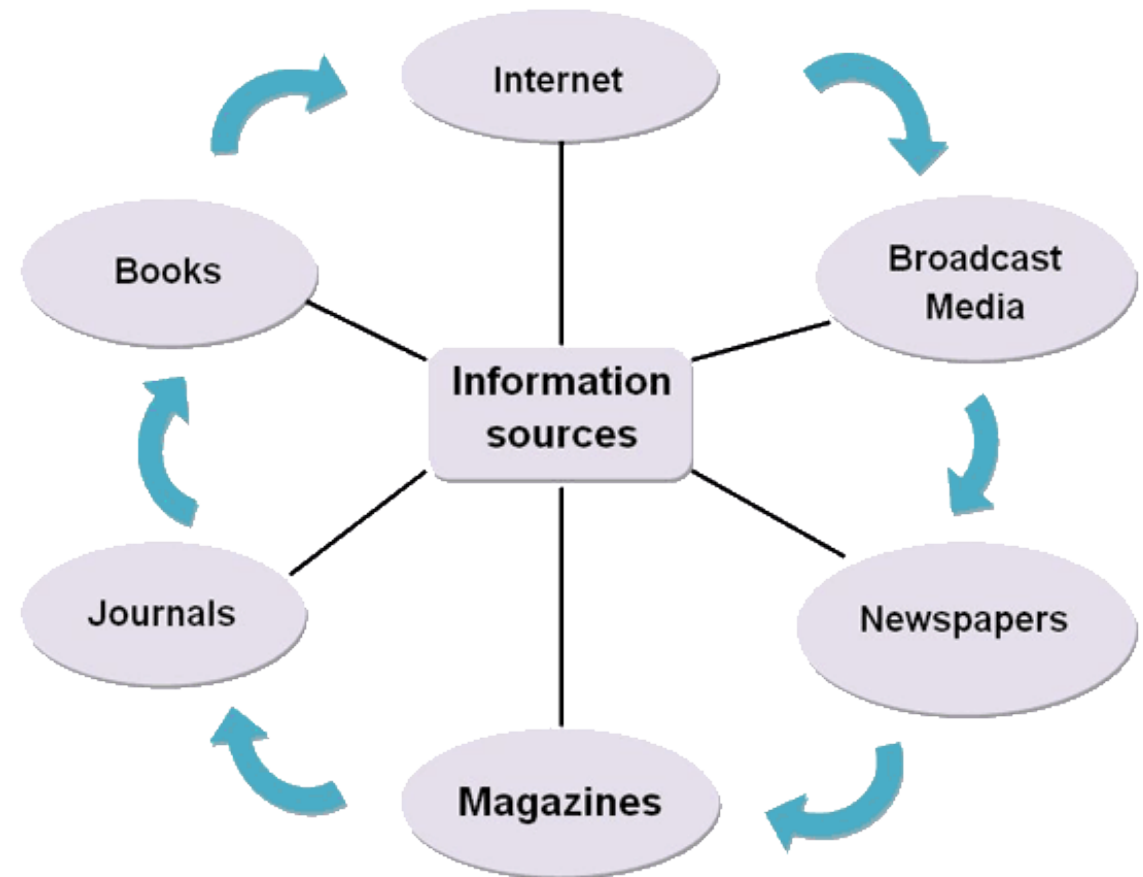
This is a strategy of finding what customers need when purchasing a service.



Keeping up to Date

It is vitally important that product and service knowledge is kept up to date, this can be done by;

- Manuals
- Brochures
- Product Specs
- Catalogues
- Asking Colleagues
- Price Listings
- Internet
- Intranet
- Supplier Updates
- Customers Comments and Feedback





Group Activity

In groups, discuss about what you have learned and complete your notes



Any Questions?



Service Offers

1. What are they?

- A service offer is what the organisation says it will offer its customers and is therefore what the customer comes to expect. ... When a customer sees a particular brand, they trust it assists them when making buying decisions as they know what to expect..

2. Why do companies have them?

- To promote the company
- To strengthen the brand
- To provide a Customer Service Policy, Refunds Procedure and a Complaints Policy

3. What Impact will they have?

- They show that the company is committed to customers thoughts and service plus it is a legal responsibility.



Forming Expectations

- Research Customer experiences
- Customer Previous Experience
- Customer Family Experience
- Customer Service Standards
- Business Reputation, Image.
- General Word of Mouth.



Forming Expectations

If Customers needs are not met, what impact will it have?

In summary the key features of failing to deliver excellent customer service are as follows;

- Customers expectations are not exceeded
- Customers do not enjoy their experience
- Customers will not return and will not recommend the business to others.
- You lose a sense of satisfaction.
- Low Staff Morale.
- Lose Money.

WHAT HAPPENS AFTER POOR CUSTOMER EXPERIENCE



WILL NEVER USE
THE COMPANY
AGAIN



WILL TELL
FAMILY & FRIENDS
ABOUT THE
EXPERIENCE



WILL ESCALATE
TO A SUPERVISOR
OR MANAGER

Identifying Customer Needs

Verbal - Firstly it is important that we talk to our customers for their true opinions.

Formal - We could carry out surveys or questionnaires to establish a more detail report on the service we provide.

Marketing - Gather feedback from our customers either through the telephone, written evaluation cards or verbally.

Experience - We can also research the previous complaints and compliments to gauge the understanding of how the customers feel.



Methods in Obtaining Customer Feedback

- Questionnaires
- Comment Cards
- Surveys
- Competitions
- Focus Groups
- Complaints
- What else can you think of?



Class Activity

Discuss How could we keep customers loyal to our company and why is this important?



Customer Loyalty

- Loyalty is built by consistently delivering excellent standards of customer service.
- Loyalty can be built through special offers, customer events, loyalty cards and points programmes.
- Maintaining effective customer relationships builds customer loyalty and therefore repeat business. It is much cheaper to keep existing customers than to constantly have to find new customers!



Company Brand

- A brand provides a customer with a clear picture of what the organisation is, what their standard of customer service is and the product or service they provide.
- This 'brand' is what represents who they are as a company and with time builds on their reputation and quality of goods.



BRANDING

is the way that your customer perceives you



Any Questions?





TLAP completion and review

Read through your answers to ensure you have completed them to the requirements of the assessment, use all resources sourced for this learning outcome adding any additional information if necessary.

DBA TLAP- Day 6

OneFile

Complete all tasks for TLAP 6

You must include;

- Learning Activities – As instructed by Tutor
- Any additional Learning activities completed before/after the course or at home.
- Please ensure you click save and submit.
- Add time spent of additional activities if required.



Tutor Name

Understanding Personal Development

Skills People Group
QUALIFICATIONS & TRAINING

Introduction

Intent

- To learn about professional and personal development
- To develop knowledge on how to assist with career development
- To apply theory to practical work when planning development

Implementation

- PowerPoint training aid, group discussion and practical tasks
- OneFile written criteria (Written Questions)
- Work products – SWOT and Personal Development Plans

Impact

- To strengthen careers choices in Digital Business Administration
- To provide supportive evidence through the completed work
- To support career opportunities in Business Administration

Our goal is to complete our objectives together using the knowledge, experience and support of the group

Using different types of questions

Describe - As much information as possible to explain your answer in detail

Explain – To add information to explain your answer more.

State – Short sentence complete with a list of items.

Identify – A description of how to establish an answer.

List – Bullet points and a small explanation (if needed)

Suggest – Make suggestions using small sentences

Outline – Brief description including multiple answers



Please use the OneFile '*Operative Verbs*' course if you wish to understand more about the verbs used during this course

So, what are we going to do today?

- 1) Understand how to develop personal skills.
- 2) Understand how professional development assists with career development.
- 3) Understand how to follow career progression routes.
- 4) Complete written questions (WQ5 Q1 - 9)
- 5) Complete Wp1 / SWOT Analysis and WP2 / PDP.

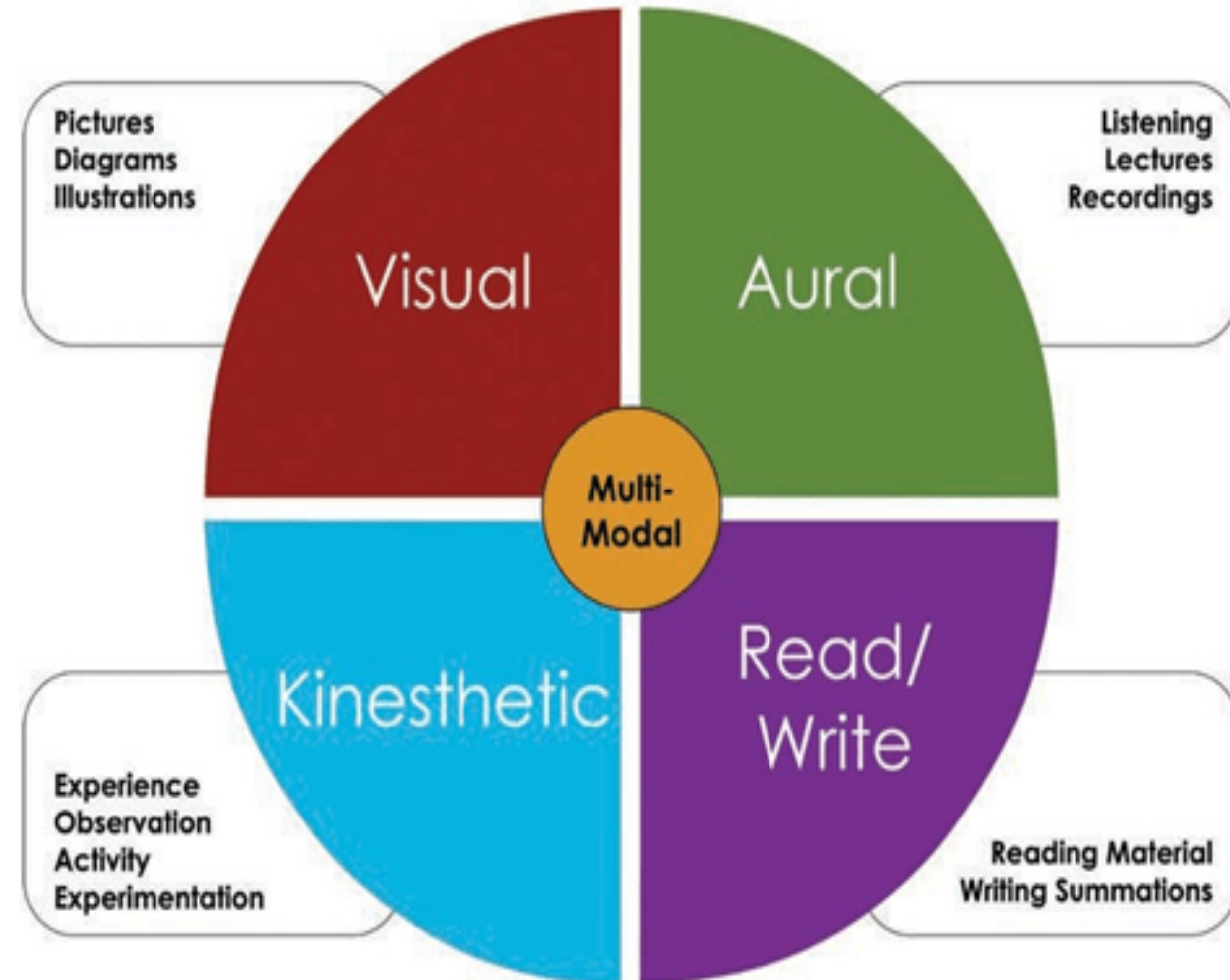


Any Questions?



Personal Development

- Personal development includes activities that improve awareness and identity, develop talents and potential, build human capital and facilitate employability, enhance quality of life and contribute to the realization of dreams and aspirations.
- We all have our own style of learning. The most common identifies four types of learners: visual, auditory, kinaesthetic, and reading/writing. Most people are a combination of these four styles, but more times than not, they have a predominant style of learning. Each of these styles has a complementary way of teaching.



Reasons for Self Development



Self-Awareness

You get to know who you really are; your values, beliefs and the purpose you want to pursue.



Direction

A sense of direction allows you to shift focus from quantity to quality. Do more and do it better.



Focus

When you see a task as a journey you will feel less desire to be distracted. You are constantly improving



Motivation

PD enables you to see that you only need motivation for the next step and not the big goal.



Resilience

Personal Development helps you better deal with negative experiences



Relationships

Constantly developing will improve your relationships with others both at home and work.

Belbin's Theory

Belbin suggests that, by understanding your role within a particular team, you can develop your strengths and manage your weaknesses as a team member, and so improve how you contribute to the team. Team leaders and team-development practitioners often use the Belbin model to help create more-balanced teams.

Approach to profiling people on the basis of personality types, to identify their strengths and weaknesses as the members of a team. It divides people into three broad classes subdivided into nine individual roles.

Team Roles and Responsibilities

- Understand your strengths to benefit the team's strengths.
- Determine what needs to get done and how you can support.
- Prepare information to discuss priorities on an ongoing basis.
- Understand ownership over specific areas or tasks.
- Ask about others and whether they reflect your goals.
- Align your skills and abilities to understand your own role within a team.



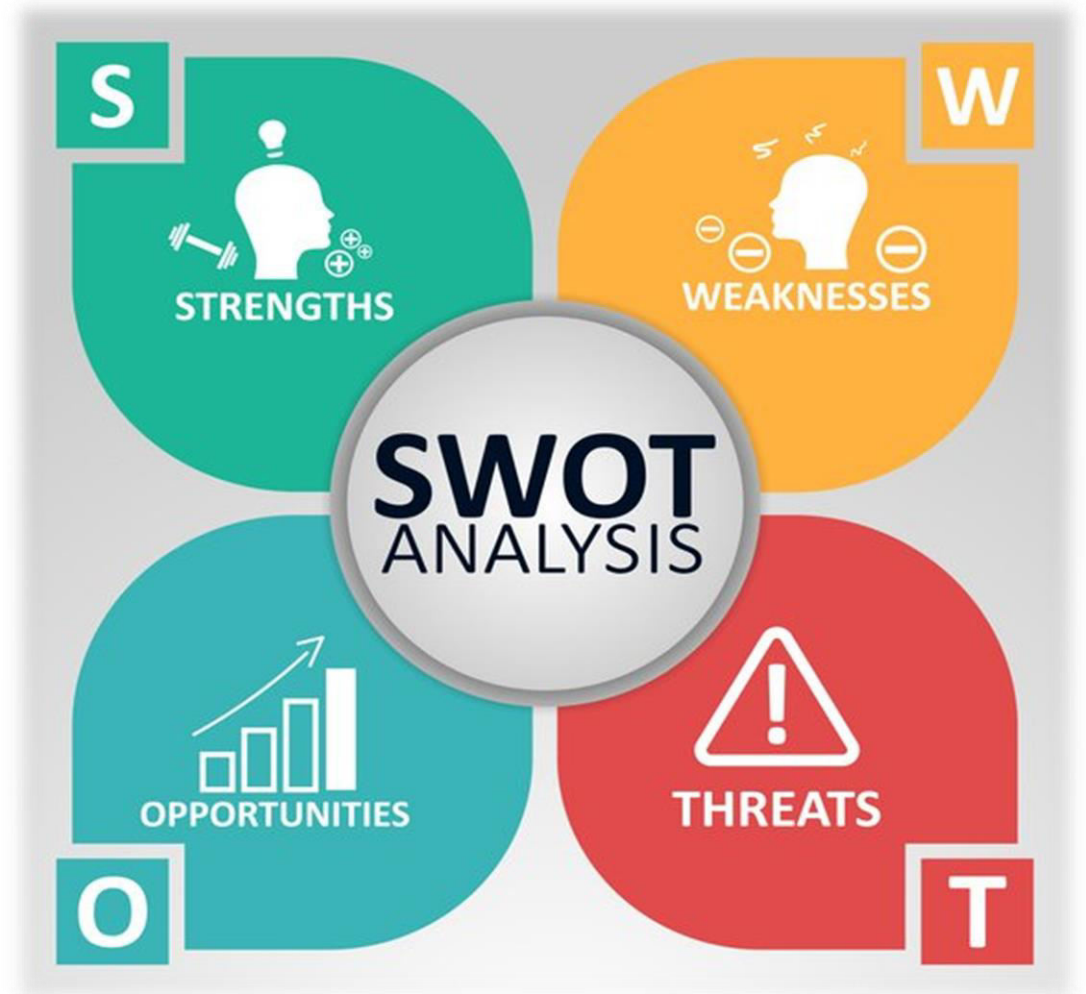


Document Practical (SWOT)

A SWOT analysis is used to identify what is good, what can improve, and how it fits in the competitive landscape for your development.

SWOT is an acronym that stands for;

Strengths
Weaknesses
Opportunities
Threats



[illegible]

Personal Strengths

Knowing your personal strengths can help you a lot in choosing the right career or making good decisions on what you find comfortable.

If you are able to focus what you do around your personal strengths, you have the chance to create something remarkable, while making it look like it's almost effortless for you.

Your biggest personal strength is what is easy for you!

Action-Oriented	Adventurous	Analytical	Artistic	Authentic
Caring	Clever	Confident	Courageous	Creative
Determined	Disciplined	Educated	Empathetic	Emotional Intelligent
Energetic	Entertaining	Fast	Flexible	Focused
Good-Looking	Helping	Inspiring	Intelligent	Leadership
Learning	Motivated	Optimistic	Organized	Outgoing
Patient	Precise	Responsible	Self-Controlled	Speaking
Spontaneous	Social / People Skills	Strategic Thinking	Team-Oriented	Wisdom

Weaknesses - Like strengths, the weaknesses component of the SWOT analysis is a self-assessment of the skills, abilities, attributes or training that you feel or have identified as requiring further development.

[illegible]

Personal Weaknesses

Knowing your personal weaknesses can help you a lot in choosing the right areas to support your personal development.

If you are honest with your own weaknesses, you have the ability to feel more confident when dealing with the challenges in life.



Aggressive	Arrogant	Bossy	Chaotic	Close-minded
Complaining	Contemptuous	Controlling	Cynical	Fearful
Greedy	Greedy	Ignorant	Impatient	Impulsive
Indifferent	Insensitive	Intolerant	Irresponsible	Lazy
Lethargic	Loose-tongued	Mistrustful	Moody	Naive
Negative	Obstructive	Passive	Prejudiced	Reckless
Rude	Selfish	Shallow	Short-sighted	Shy
Sloppy	Stubborn	Slow	Strict	Undisciplined

SWOT Analysis

Strengths - Strengths are an internal assessment of your attributes that give it you an advantage over others. These can be skills, abilities, attributes or training.

Weaknesses - Like strengths, the weaknesses component of the SWOT analysis is a self-assessment of the skills, abilities, attributes or training that you feel or have identified as requiring further development.

Opportunities - Opportunities are the things available to you to help your development such as qualification courses, internal training, shadowing colleagues, employment vacancies and promotion.

Threats - Threats are the things that can hinder your development from money to time available to study. Ultimately, these threats are the obstacles facing your development and what could adversely affect your future if not measured.

Strengths	Weaknesses
Opportunities	

Personal & Professional Development

Many employees desire to improve their abilities, productivity and happiness in the workplace. The development of key skills can lead to significant improvements in your work and relationships. Identifying the specific areas you want to work on is an important first step in professional development with key areas of development at work.



Any Questions?



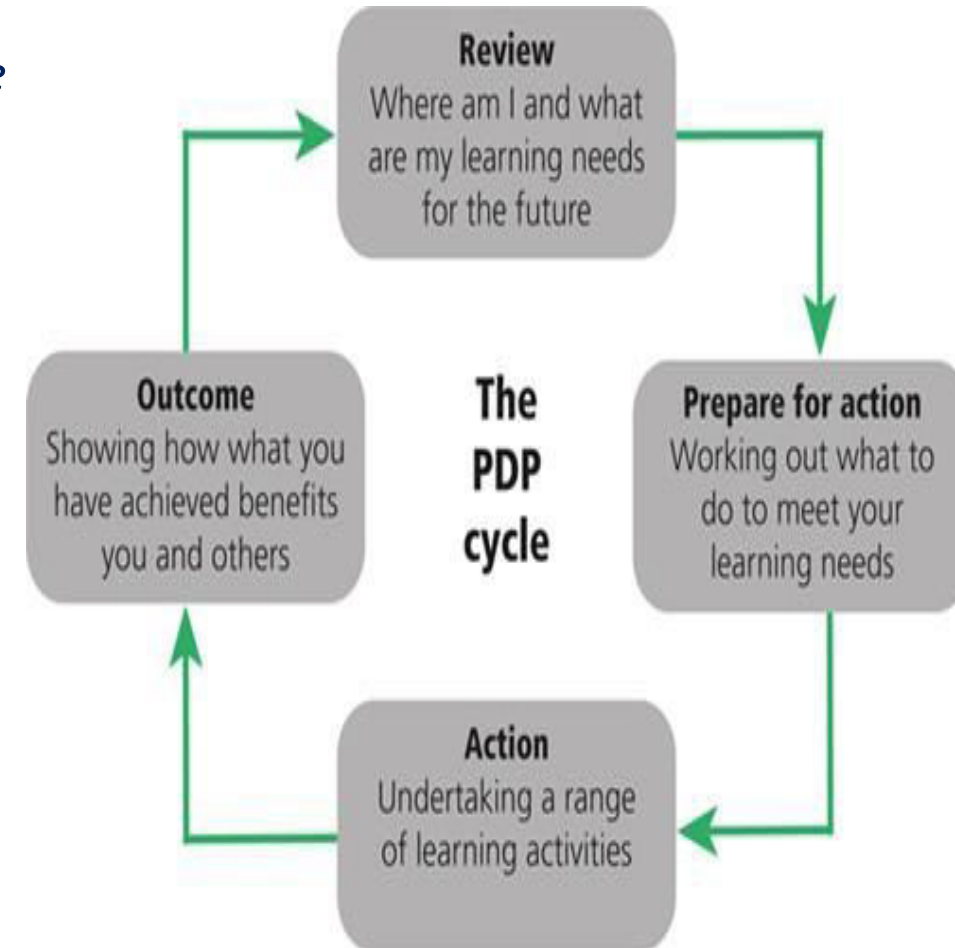
Document Practical

(Persona Development Plan)

“Personal development planning enables individuals to take charge of their own learning. Learning becomes a proactive as well as reactive process, designed and prioritised to support immediate development needs as well as longer term ambitions”

A Personal Development Plan (PDP) enables learners to identify key areas of learning and development activity that will enable them to either acquire new or develop existing skills and behavioural attributes for the following purposes:

- Enhance performance in their current role
- Address anticipated changes in their current role
- Address career aspirations towards a future role



PDP

Development Objectives are objectives that you have identified to enable you to meet the learning and development needs identified at the skills analysis stage

What are my development Objectives? (Short and Long-term goals)					

PDP

Priority identifies whether your development objective is:

- **critical** to your **current role**
- **beneficial** but non-critical to your **current role**
- **critical** to your progressing into **future role**
- **beneficial** but non-critical to progressing into **future role**

What are my development Objectives? (Short and Long-term goals)	Priority				

PDP

Activities can constitute any learning or development activity that will enable you to achieve your development objectives e.g., formal training, on-the-job training, work-shadowing another colleague etc.

What are my development Objectives? (Short and Long-term goals)	Priority	What activities do I need to undertake to achieve my objectives?			

PDP

Support/Resources describe what you need to help you achieve your development objectives. Typically, this would involve support from your manager, department or colleague to enable you to undertake a learning or development activity such as allowing you time away from your role or funding from your department.

What are my development Objectives? (Short and Long-term goals)	Priority	What activities do I need to undertake to achieve my objectives?	What support/resources do I need to achieve my objectives		

PDP

Target and Actual dates state when you intend to achieve your development objectives followed by the date you achieve them. Data in these columns is particularly useful when you review your PDP as it will enable you to identify any factors that may have prevented you from achieving your development objectives on the target date and build in contingencies to prevent this from occurring in the future.

What are my development Objectives? (Short and Long-term goals)	Priority	What activities do I need to undertake to achieve my objectives?	What support/resources do I need to achieve my objectives	Target date for achieving my objectives	Actual date of achieving my objectives

PDP

Review date states when you will review progress on your Personal Development Plan. If you undergo the personal development process annually, we recommend that you review your PDP every six months therefore enabling you to:

- Assess your progress
- Reflect on your learning
- Identify whether your development objectives need to be amended
- Identify factors that may have prevented you from achieving your development objectives
- Build in contingencies to enable you (where possible) to meet your agreed target date in the future

What are my development Objectives? (Short and Long-term goals)	Priority	What activities do I need to undertake to achieve my objectives?	What support/resources do I need to achieve my objectives	Target date for achieving my objectives	Actual date of achieving my objectives
Review Date:					

Identifying progression routes

We can review our own organisational structure that include;

- Types of structure.
- Geographic location.
- Business product type.
- Organisational charts.
- *Progression routes we can follow may depend on;*
 - Training and development at different levels.
 - Grades and scales of role.
 - Pay at different levels (financially motivated)
 - Entry level and qualifications.
 - Our transferability of skills.

We can also review the wider business environment progression to expand our knowledge;

- Identify job roles in your sector.
- Grades and scales of role
- Review sector job market.
- Appropriate sources of jobs for different sectors.
- Stay up to date with industry changes and legislation.
- Socio-cultural.
- Technological.

Being S.M.A.R.T

SMART is a mnemonic acronym, giving criteria to guide in the setting of objectives, for example in project management, employee-performance management and personal development.



Identifying progression routes

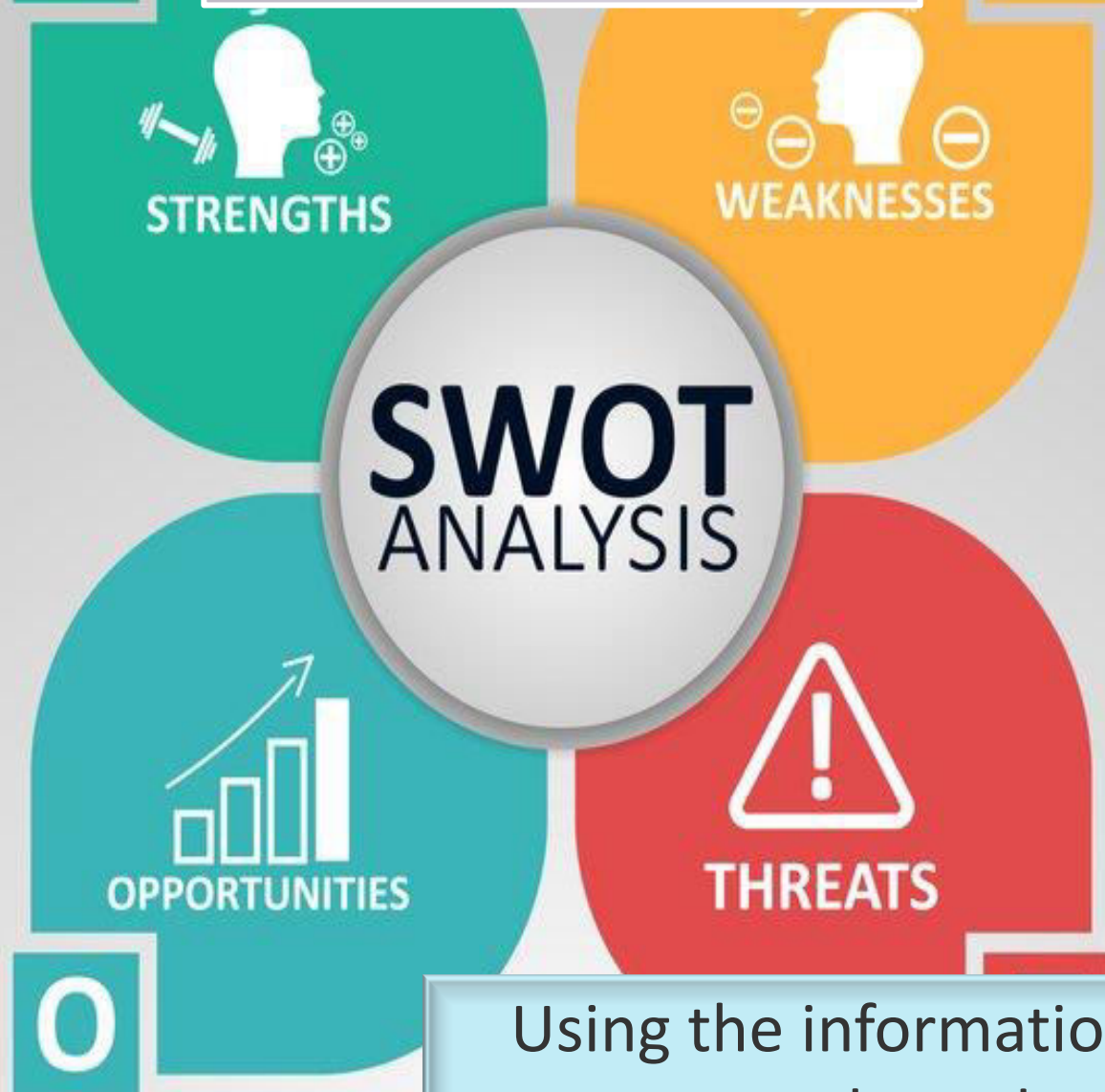


- 
- Other ways to achieve your goals,
 - Be positive, persistent and proactive.
 - Create SMART targets.
 - Establish the best routes to achieving your goals.
 - Plan of action PDP.
 - Seek information, advice and guidance.
 - Be prepared to make alterations to your plans as a result of changes to goals.
 - Evaluate your training and development.
 - Be open to experiential learning.

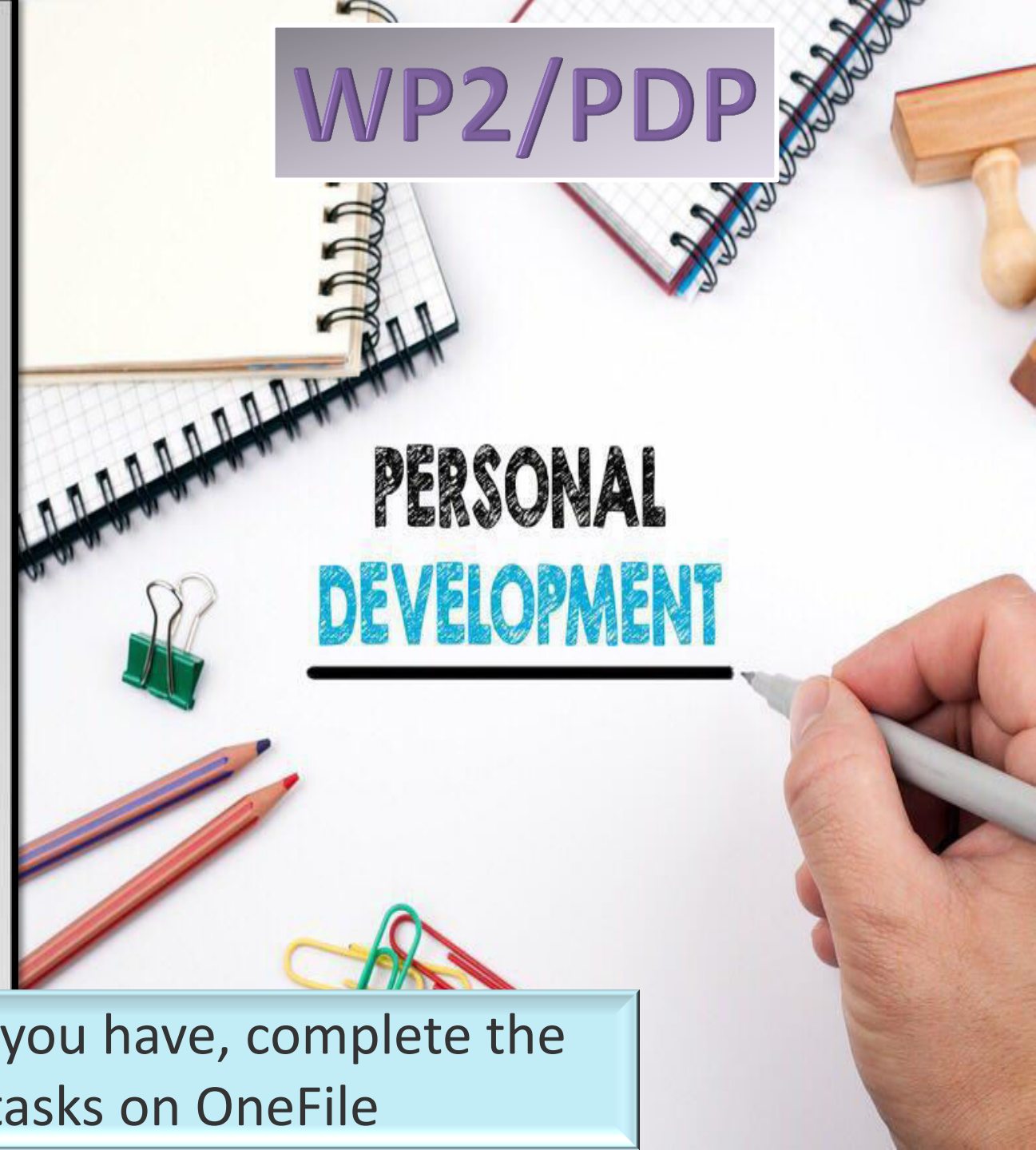
Any Questions?



WP1/SWOT



WP2/PDP



Using the information you have, complete the work product tasks on OneFile



TLAP completion and review

Read through your answers to ensure you have completed them to the requirements of the assessment, use all resources sourced for this learning outcome adding any additional information if necessary.

DBA TLAP- Day 5

OneFile

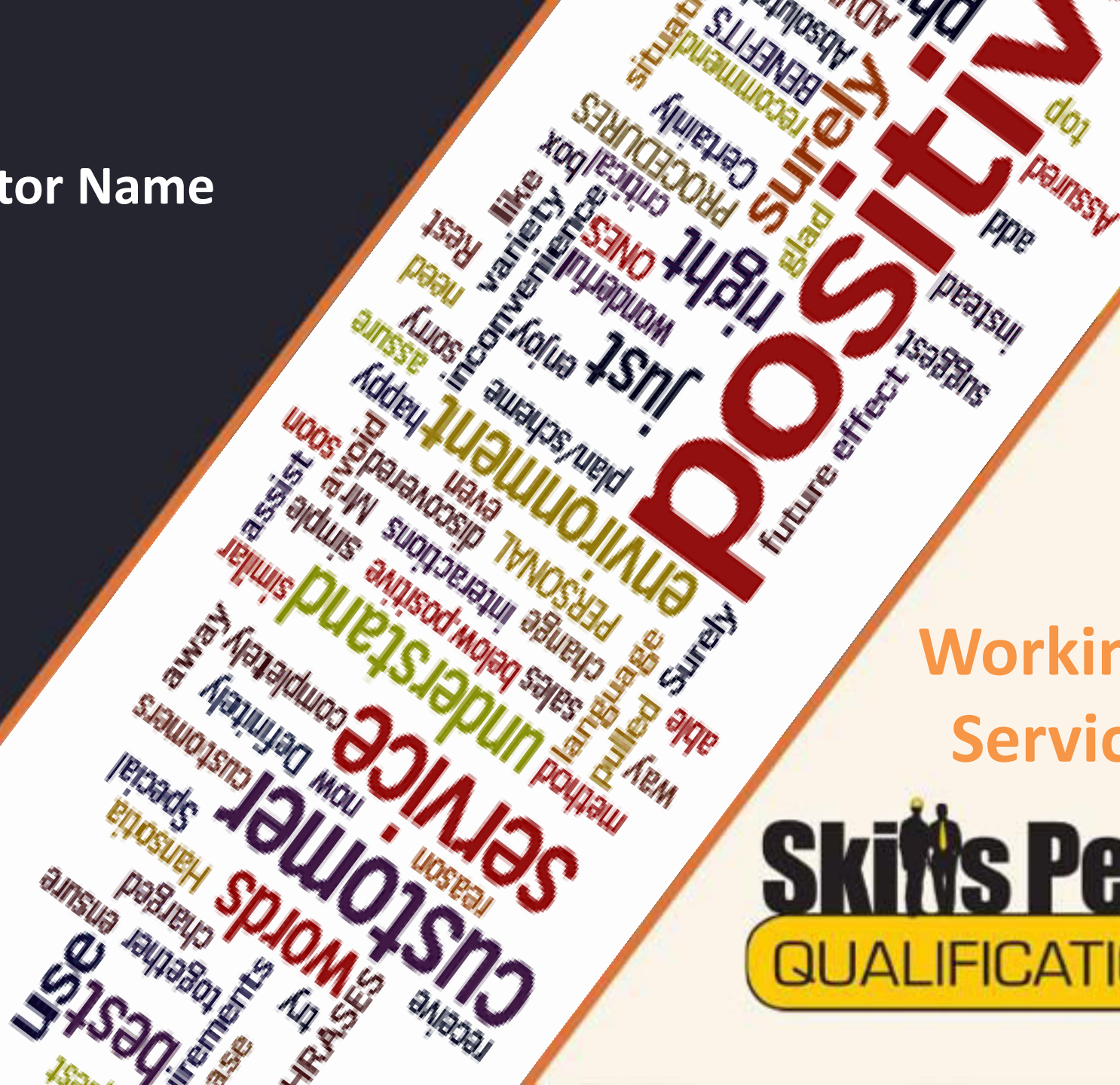
Complete all tasks for TLAP 5

You must include;

- Learning Activities – As instructed by Tutor
- Any additional Learning activities completed before/after the course or at home.
- Please ensure you click save and submit.
- Add time spent of additional activities if required.



Tutor Name



Working in a Customer
Service Environment

 **Skills People Group**
QUALIFICATIONS & TRAINING

Introduction

Intent

- To learn about working in a business Customer Service environment
- To develop knowledge on Customer Service legislation
- To prepare theory to occupational situations

Implementation

- PowerPoint training aid, group discussion and practical tasks
- OneFile written criteria (Written Questions)
- Group work and class discussions

Impact

- To strengthen confidence when working in Customer Service
- To provide supportive evidence through the completed work
- To support sustainability in knowing the relevant legislation

Our goal is to complete our objectives together using the knowledge, experience and support of the group

Using different types of questions

Describe - As much information as possible to explain your answer in detail

Explain – To add information to explain your answer more.

State – Short sentence complete with a list of items.

Identify – A description of how to establish an answer.

List – Bullet points and a small explanation (if needed)

Suggest – Make suggestions using small sentences

Outline – Brief description including multiple answers



Please use the OneFile '*Operative Verbs*' course if you wish to understand more about the verbs used during this course

So, what are we going to do today?

- 1) Understand principles of responding to customers' problems or complaints.
- 2) Identify the interpersonal and team working skills required in the customer service environment.
- 3) Identify the legislation which supports the customer service process.
- 4) Complete written questions (WQ7 Q1 - 14)

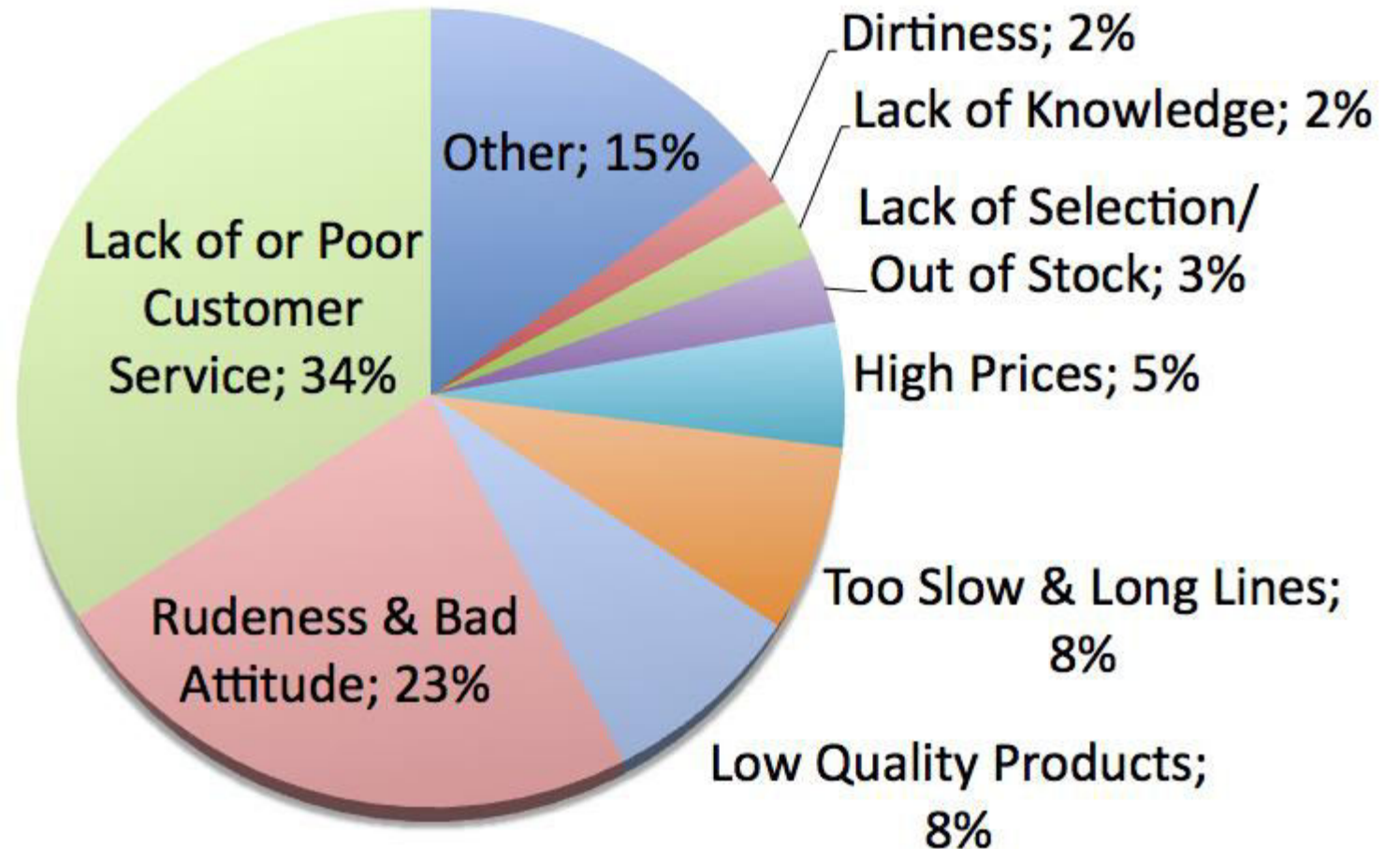


Any Questions?



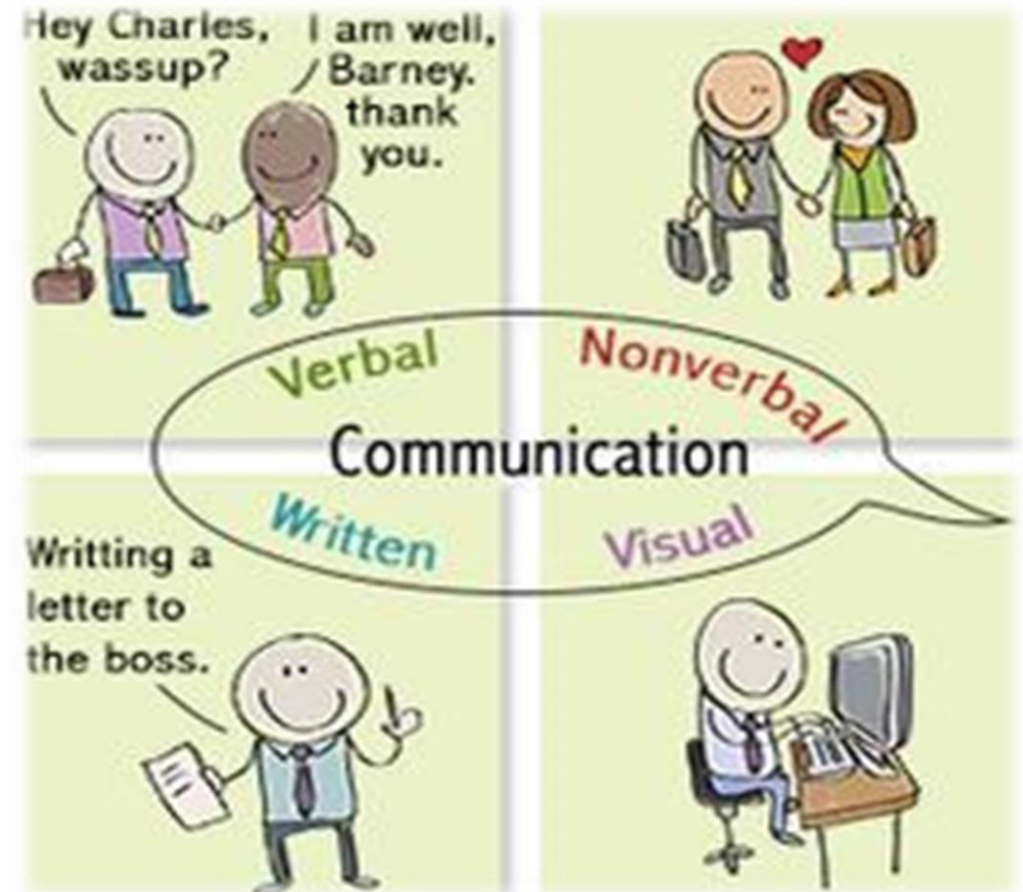
Customer complaints and Problems

- Customers can complain mainly about;
- Customer Service
- Products
- Systems and Procedures
- Unhelpful staff
- Unable to locate staff for advice
- Queues
- Attitude
- Quality of products
- Availability of Products
- Prices
- Store opening times
- Procedure for ordering goods
- Returned items.



The types of communication

- Verbal communication (spoken in person or by telephone)
- Non-Verbal communication (use of body language and facial expressions)
- Written communication (written information such as leaflets or information guides)
- Visual communication that includes online and internet information sources
- Why is it important to communicate?



Adapting our Communication

How can we adapt our communication methods?

Blind or Partly Sighted:

- Talk to them in a friendly manner, possibly read out the menu or specific information so they are able to understand

Deaf or Hard of Hearing:

- Show that you are open to help using gestures, positive body language and possibly show them pictures of the product or menu.

Language Difficulties:

- If you have the ability to speak their language, show pictures or use a colleague that best suits the situation



Non-Verbal Communication

This includes:

- The way you stand / Posture
- Body language
- Your facial expression
- Eye Contact
- Smell
- Your gestures
- Your tone of voice
- Your appearance
- Attitude
- Perception

How does this affect the behaviour of the customer?



Personal Presentation, approach and attitude

How does a smart appearance, approach and positive attitude effect customers views on the business?

- Personal presentation means the way you present yourself in everyday situations including more stressful ones such as sales.
- You are your own brand, and what you do and say, as well as your appearance, is all part of that. This means dressing smartly, being clean and having good personal hygiene, and carrying yourself well.
- Having a positive attitude and approach to customers both physically and virtually sets the brand and image of the company you represent through first impression and appearing professional.



Any Questions?



Work Groups Skills

- Have the ability to discuss and Listen
- Trust each other
- Learn from experiences
- Be supportive
- Allow others to lead depending on ability and skills
- How have you worked in groups before?



Maintaining Working Relationships

- Work Co-Operatively
- Use team work to deliver good CS
- Be responsive to Colleagues
- Achieve the tasks set
- Understand when and where to ask questions
- Share Information
- Allocate work loads evenly
- Relate to other feeling and beliefs
- Work to a common goal.



Interpersonal Skills for effective customer service

- Communication
- Listening Skills
- Use effect Body Language
- Questioning Skills
- Problem Solving Skills
- Decision Making Skills
- Ability to work in a team
- Telephone Skills
- Ability to gather info
- Desire to provide a good standard of service



Any Questions?



Consumer Law

Various acts cover the consumer against rogue trading, over pricing, faulty equipment etc.

These acts allow for us to have a voice as a customer:

- Consumer Protection Act
- Consumer Credit Act
- The Consumer Protection Regulations
- Sales of Goods Act
- Supply of Goods and Services Act
- Trade Description Act
- Equality Act



Consumer Law

Different people have different needs therefore we must respect those differences by not allow discrimination, harassment or victimisation.

- Provide a service despite customers abilities or disabilities.
- Treat people as we ourselves wish to be treated
- Provide equality for all, not just a selected few.
- Promote an inclusive culture.
- Promote good working relations based on the abilities as an individual.



HASAW Act - Legislation

This Act makes it the **employer's** duty to provide:

1. Safe routes of entry to and exit from the premises.
2. A safe working environment.
3. Adequate welfare facilities such as washrooms.
4. Safe equipment and systems of work.
5. Ways to ensure the safe use, handling, storage and transport of articles and substances.
6. Training and information on health and safety Thorough investigation of any accidents.
7. Provide PPE
8. Produce and Maintain a Health and Safety Policy (5 or more employees)



HASAW Act - Legislation

The Act makes it *your responsibility*, and that of your colleagues to:

1. Take reasonable care for your own health and safety.
2. Take reasonable care for the health and safety of other people who may be affected by your actions
3. Co-operate with your employer or anybody else carrying out duties under the Act.
4. Use the appropriate PPE
5. Follow the training you have received from the employer or previous learning.



Confidentiality

Why is it important to respect our CUSTOMERS confidentiality?

- Failure to protect and secure confidential information may not only lead to the loss of business or clients, but it also unlocks the danger of confidential information being misused to commit illegal activity such as fraud. A key element of confidentiality is that it helps build trust.

Why is it important to respect our Company's confidentiality?

- Confidentiality refers mainly to internal business information shared between the business owner and other individual, and either can't or shouldn't be communicated to a third party without the express consent of the business owner.
- What could happen if company information is shared with competitors?



Confidentiality

To comply to GDPR, organisations need to embed six privacy principles within their operations:

- Lawfulness, fairness and transparency.
- Purpose limitations.
- Data minimisation.
- Accuracy.
- Storage limitations.
- Integrity and confidentiality

It is vital that you protect the information given to you about your customers and clients. This information is protected by the data protection act, and you could find that in certain circumstances you could be prosecuted if you willingly disclose this information to other persons. Giving details of accounts to rival companies could result in the loss of business or dismissal.



COPs and Ethical Standards

Codes of Practice and ethical standards are needed to provide employees with guidelines on how to conduct their business with customers, these will potentially include:

- Dealing with Customers
- Ethical Standards including Honesty, Pride, Integrity, Politeness, Behaviour etc.
- Customer Service Standards
- Customer Complaints Policy
- Social Awareness
- Confidentiality
- Public benefit
- E&D
- Etc



Any Questions?





TLAP completion and review

Read through your answers to ensure you have completed them to the requirements of the assessment, use all resources sourced for this learning outcome adding any additional information if necessary.

DBA TLAP- Day 7

OneFile

Complete all tasks for TLAP

You must include;

- Learning Activities – As instructed by Tutor
- Any additional Learning activities completed before/after the course or at home.
- Please ensure you click save and submit.
- Add time spent of additional activities if required.



Tutor Name

Supporting the
Customer Service
Environment

A photograph of three female call center agents in a bright office setting. They are all wearing headsets and smiling at the camera. The agent in the foreground is in sharp focus, while the two behind her are slightly blurred. They are all wearing light blue or white blouses. A computer keyboard and a microphone are visible in the lower left foreground.
Skills People Group
QUALIFICATIONS & TRAINING

Introduction

Intent

- To learn about effective Customer Service communication
- To develop practical skills
- To adapt theoretical knowledge to occupational situations

Implementation

- PowerPoint training aid, group discussion and practical tasks
- OneFile written criteria (Written Questions)
- Group work and class discussions

Impact

- To strengthen confidence when communicating with customers
- To provide supportive evidence through practical preparation
- To support career opportunities with confidence in communicating

Our goal is to complete our objectives together using the knowledge, experience and support of the group

Using different types of questions

Describe - As much information as possible to explain your answer in detail

Explain – To add information to explain your answer more.

State – Short sentence complete with a list of items.

Identify – A description of how to establish an answer.

List – Bullet points and a small explanation (if needed)

Suggest – Make suggestions using small sentences

Outline – Brief description including multiple answers



Please use the OneFile '**Operative Verbs**' course if you wish to understand more about the verbs used during this course

So, what are we going to do today?

- 1) Prepare to apply the practical skills required to deliver effective customer service
- 2) To demonstrate how to meet customer needs and expectations.
- 3) To understand how to communicate effectively with customers.
- 4) Complete written questions (WQ8 Q1 - 9)



Any Questions?



Customer Service Supply Chain *(example)*

Customer service has an important place in the supply chain. It is responsible for the way customers feel about the product and the company who is selling it.

If we understand the supply chain we can help in the delivery of customer service and dealing with complaints.

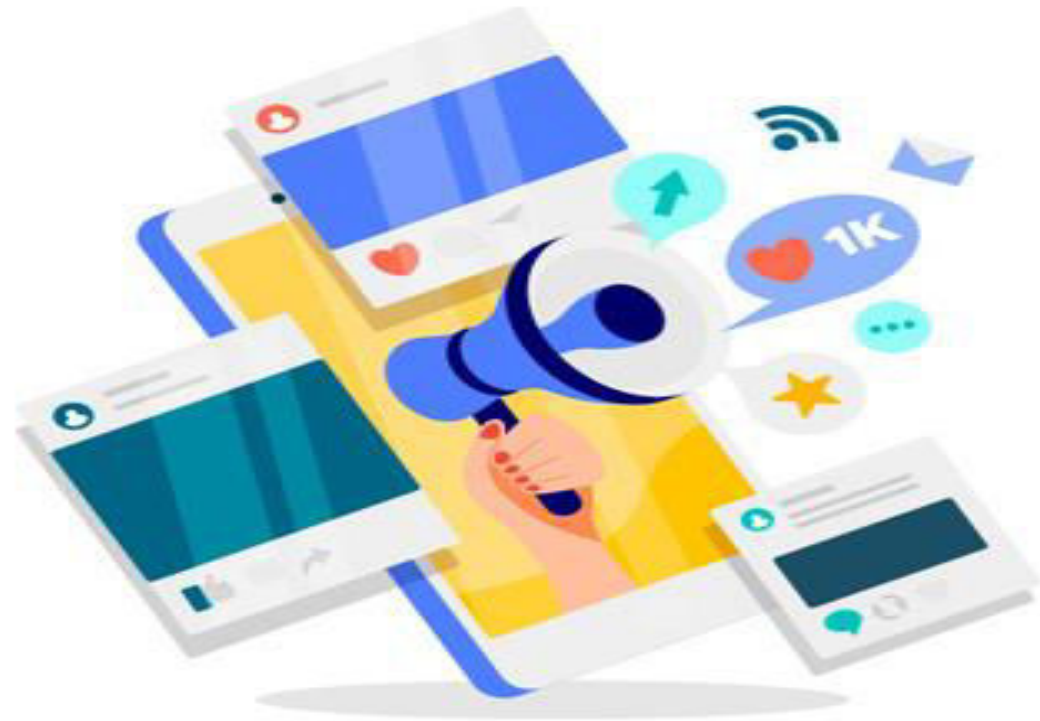
For instance; if a customer has a complaint about the quality of a product, the organisation should be able to follow the chain back from when the stock was put on display, when and who delivered it, when and where it was manufactured and where the parts were sourced.

Promoting a product/service

Organisations have a wide range of options available to promote a product or service depending on: the product/service, their target customer, what they want to achieve, budget and timescale.

These options include:

- Television
- Radio advertising
- Magazines and newspapers
- Posters
- Demonstrations
- Social media
- E-mail
- Telephone marketing



Each of these have their own strengths and weaknesses, discuss what you think they are?

Identifying needs and Expectations

Customers will always demonstrate their needs and expectations that benefit them as a consumer.

They can include:

- Their own previous experiences
- Word of mouth from family, friends and other customers
- Company's image and reputation
- Need for value for money
- Need for quality



*exceed
expectations*

Customers Special Requirements

There is no 2 customer generally the same, some may requiring specific attention.

They can include:

- They could be angry about a product or service.
- Hearing Impaired.
- Sight Impaired.
- Language Difficulties.
- Mobility Difficulties.
- Shy customer.

Group Discussion



In groups discuss the methods of communication we could use for different types of customers

Maintaining Standards



There are various ways a company can improve its reputation;

- Continuously improve customer relations
- Provide the best possible service
- Offer value for money
- Keep the employees up to date with product/service information
- Improve its equality image
- Allow customers to have their say through feedback.
- Allow change to service as trends are Identified.
- Be an adaptable business.

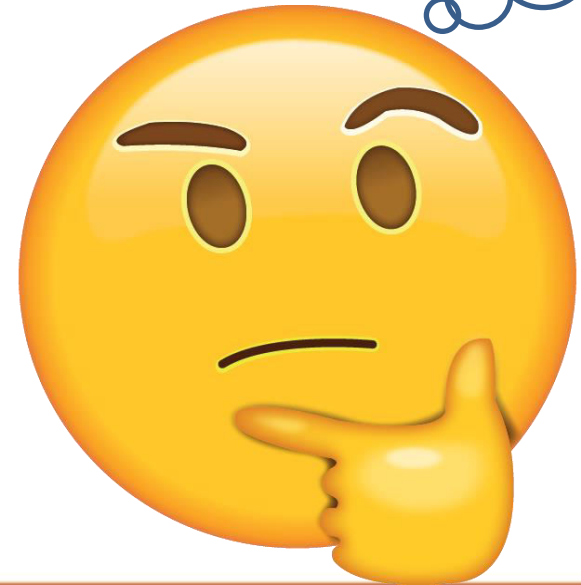
Any Questions?



Interpersonal Skills for effective team-work

Think back to yesterday and the inter-personal skills needed for customer service, discuss how they relate to teamwork

- Communication skills
 - Listening skills
- Effect Body Language
- Common goal ideas
- Problem solving skills
- Decision making skills
- Ability to work in a team
- Ability to share information
 - Use others strengths
 - Ability to compromise



Types of People

How would you adapt your own behaviour when working with the following types of people

Introvert: Someone who is reserved and quiet, quite shy. You approach them or offer help on their terms, maybe start a conversation.

Extrovert: A friendly person who likes being with and talking to other people : an outgoing person. Control the interaction by asking leading questions establishing their needs.

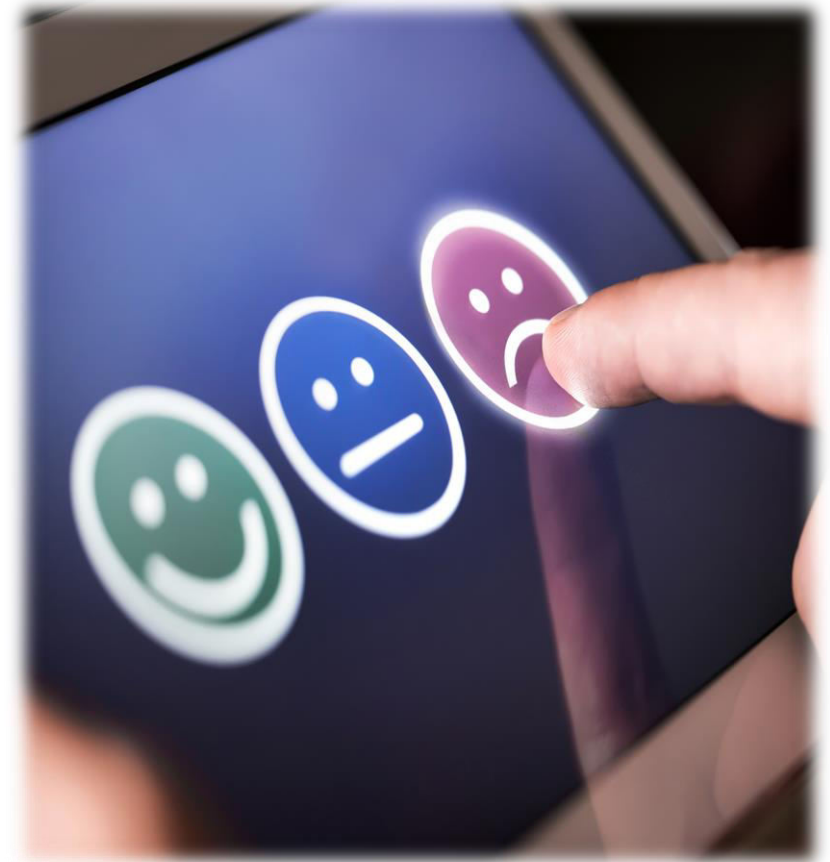
Assertive: Assertiveness is a form of communication in which needs, or wishes are stated clearly with respect for oneself. Again, control the situation but do not become too assertive.

Aggressive: A situation where the person is ready and willing to fight, argue, etc. : feeling or showing aggression. Think safety for yourself and assess the situation, do not become angry or aggressive.

Ways of dealing with complaints

There are many personal qualities that are required when dealing with customer problems

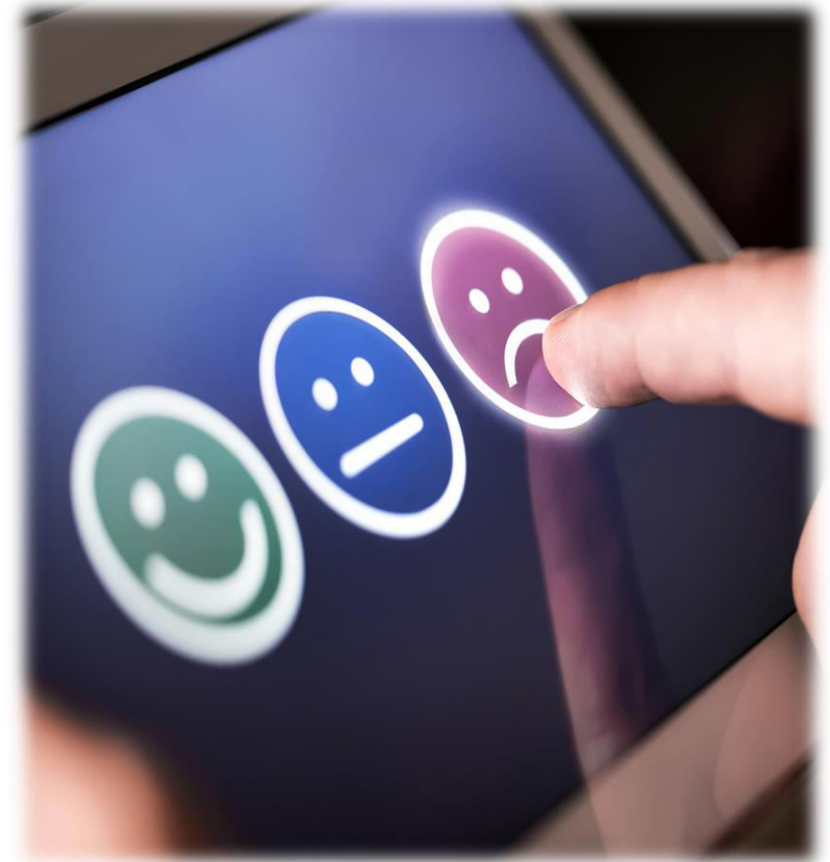
- Be polite
- Show empathy with customer
- Keep customers informed
- Do not disagree with the customer
- Use appropriate body language
- Report customer service problems to a supervisor or to management
- Offer an alternative based on the complaint
- Exchange a product
- Offer a goodwill gesture...What do you think this might be?



Customer Complaints Do Skills

Skills that are a positive to use;

- Be able to listen
- Ability to remain calm in stressful situations
- Have clear thought process (Think outside the box)
- Focus on the customer
- Problem solving as mentioned
- Empathise with the customers situation (put yourself in their shoes)



Dealing with complaints

H.E.A.T

H

E

A

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Any Questions?





TLAP completion and review

Read through your answers to ensure you have completed them to the requirements of the assessment, use all resources sourced for this learning outcome adding any additional information if necessary.

DBA TLAP- Day 8

OneFile

Complete all tasks for TLAP 8

You must include;

- Learning Activities – As instructed by Tutor
- Any additional Learning activities completed before/after the course or at home.
- Please ensure you click save and submit.
- Add time spent of additional activities if required.



Tutor Name

Customer Service
Excellent
Average
Poor

Customer Service
Improvements

Skills People Group
QUALIFICATIONS & TRAINING

Introduction

Intent

- To learn how to apply customer service improvements
- To show practical skills through set scenarios
- To apply knowledge and skills to occupational situations

Implementation

- PowerPoint training aid, group discussion and practical observation
- OneFile written criteria (Written Questions)
- Group work, class discussions and practical activity for OBS 1

Impact

- To strengthen confidence in business customer service
- To provide supportive evidence through practical observation
- To support career opportunities with confidence in business

Our goal is to complete our objectives together using the knowledge, experience and support of the group

Using different types of questions

Describe - As much information as possible to explain your answer in detail

Explain – To add information to explain your answer more.

State – Short sentence complete with a list of items.

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Suggest – Make suggestions using small sentences

Outline – Brief description including multiple answers



Please use the OneFile '*Operative Verbs*' course if you wish to understand more about the verbs used during this course

So, what are we going to do today?

- 1) Understand more on how to apply customer service improvements.
- 2) Complete written questions (WQ9 Q1 - 3)
- 3) Participate in Customer Service Activity 1 **OBS 1** which covers:
 - I. Apply the practical skills required to deliver effective customer service.
 - II. Demonstrate how to meet customer needs and expectations.
 - III. Communicate effectively with customers



Any Questions?



Changes to Service

Customers must be confident in the person delivering customer service that they know and understand the features and benefits of the products and services being offered, this will;

- Build Confidence in the company
- Build a positive reputation as a company putting their customers first.
- Build positive customer relationships
- Better Image and prospects
- Better sales targets and profits.



Behaviour on others

Think back to when we discussed how our own communication and behaviour met the needs of customers and discuss the relevance to how this might affect the behaviour of others





Useful and constructive feedback

Receiving constructive feedback can be emotionally draining when taken as a personal affront but feedback will demonstrate that you're an effective communicator, team player and hard worker who is always eager to improve.

Discussion: Conduct an open discussion on ways that you have used or know we can use to obtain useful and constructive feedback from others about our own performance.

1. Set goals for yourself
2. Ask the right questions
3. Analyse your feedback and identify patterns
4. Develop a winning strategy to overcome these obstacles and achieve your goals
5. Share your plan with others and get support



**Customer Service
Activity for
OBS 1**

To participate in the tutor-devised customer service / helpdesk activity in groups using different forms of communication methods including telephone assistance.

The activity must cover the following criteria.

1.1	OBS1	Identify the type of organisation
1.2	OBS1	Identify the organisation's customers including internal and/or external and those with specific needs
1.4	OBS1	Maintain established customer records
1.5	OBS1	Suggest a unique selling point or unique service offer for a product or service
1.6	OBS1	Suggest ways of promoting a product or service to increase customer awareness
2.2	OBS1	Identify customers with special requirements
2.3	OBS1	Identify how to use methods of communication and behaviour to meet the individual needs of specified customers
2.4	OBS1	Identify and use methods of checking customer satisfaction
3.1	OBS1	Use different methods of communication
3.4	OBS1	Use the telephone system efficiently and effectively
3.7	OBS1	Apply problem solving theories to resolving a customer service problem
4.1	OBS1	Devise a method for obtaining customer feedback

Any Questions?





TLAP completion and review

Read through your answers to ensure you have completed them to the requirements of the assessment, use all resources sourced for this learning outcome adding any additional information if necessary.

DBA TLAP- Day 9

OneFile

Complete all tasks for TLAP 9

You must include;

- Learning Activities – As instructed by Tutor
- Any additional Learning activities completed before/after the course or at home.
- Please ensure you click save and submit.
- Add time spent of additional activities if required.

